Bournemouth, Dorset and Poole
Workspace Strategy

OCTOBER 2016

Bournemouth Borough Council | Christchurch and East Dorset Councils delivering services together | Dorset County Council | North Dorset District Council | Borough of Poole | Purbeck District Council | West Dorset District Council | Weymouth & Portland Borough Council







Acknowledgements

The Bournemouth, Dorset and Poole Workspace Strategy (October 2016) was produced in association with the Bournemouth, Dorset and Poole local authorities and the Dorset Local Enterprise Partnership.

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Contents

Appendices

Executive Summary

INTRODUCTION

The local authorities of Bournemouth, Dorset and Poole in association with the Dorset Local Enterprise Partnership (LEP) have prepared a revised Workspace Strategy for the Dorset LEP area which includes the Eastern and Western Dorset Housing Market Areas (HMAs). This Workspace Strategy supersedes the 2008 Workspace Strategy and 2012 Workspace Study.

A revised strategy is required in order to provide updated employment land projections and business sector forecasts to take account of changes in the economic context since the preparation of the 2008 and 2012 Workspace Studies.

The updated strategy is also necessary as a shared evidence base to inform the review of the Dorset Strategic Economic Plan (SEP), informal strategic planning undertaken between local authorities, Local Plans and Employment Land Reviews. The informal strategic planning process and work undertaken between local authorities through the Duty to Co-operate will inform the future distribution of employment land across the Dorset LEP area to 2033. This will help to ensure the delivery of sufficient employment land and premises of the right type and in the right location to meet the future needs of the economy for the Dorset LEP area.

The Workspace Strategy is integral to achieving the objectives of the Dorset SEP and aspirations for economic growth across the Dorset LEP area. The SEP sets out a vision to establish a step change in the Dorset economy through investment in infrastructure and skills. This includes extensive plans for economic growth including the delivery of key infrastructure to facilitate economic growth on strategic sites such as Bournemouth Airport Business Park, the Port of Poole and the Dorset Enterprise Zone at Dorset Green, Purbeck. In addition funding has enabled feasibility work to unlock significant growth in the Dorchester / Weymouth corridor. In order to support growth, the SEP identifies the need to secure the delivery of sufficient employment land to meet the needs of local business and inward investment.

The preparation of the Workspace Strategy has been predicated on a robust, market facing assessment of the demand for and supply of employment land, sites and premises in the Dorset LEP area. The overarching objectives of the Workspace Strategy are as follows:

1. To establish employment Land projections for the Dorset LEP area and the Eastern and Western Dorset HMAs (as functional economic areas) for B1, B2 and B8 use classes to 2033.
2. To balance employment land demand / supply and provide recommendations regarding the provision and distribution of land and premises across the Dorset LEP area and Eastern and Western Dorset HMAs.

PLANNING POLICY

There is clear support at a national and local level to ensure an adequate supply of employment land is provided to support strong and sustainable economic growth. This is evidenced through Government priorities set at a national level through the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG) and through placing Local Plans at the heart of development and growth.

The NPPF sets out the key economic objective to achieving sustainable economic growth through the planning system as;

"contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure."

However, there is strong competition for development land, particularly from housing which also enjoys support through Government policy. The key challenge at the local level is to support sustainable economic development through the delivery of sufficient new homes, business and industrial units and associated infrastructure to meet local needs.

The Dorset LEP was set up in 2011 to help determine the priorities for investment in roads, buildings and facilities in Dorset, in order to drive sustainable growth and create the right conditions for job creation.

In 2014 the LEP published and submitted a SEP 'Transforming Dorset' to central government. This document has formed the basis of negotiations with government for Growth Deal funding. The Dorset LEP has subsequently received a total of £79M towards infrastructure to unlock key housing and employment sites. The funding received to date has been allocated to a range of projects that include the provision of infrastructure around Bournemouth Airport (£39.5M) and the Port of Poole (23.3M). In addition, a new agri-tech centre has been built at Kingston Maurward College (£0.9M) and feasibility work has been undertaken to enable projects in the Dorchester/Weymouth corridor (£1.9M) including the facilitation of multi-modal transport opportunities.

A refresh of the SEP Vision and Strategic Objectives has been prepared alongside the preparation of further funding bids to deliver strategic infrastructure. These revisions to the SEP, together with this revised Workspace Strategy, will form the key evidence base documents that will inform the work currently ongoing on an informal strategic planning approach for Dorset, that will guide the development of new planning policies in future Local Plan documents, aimed at promoting economic growth in line with the NPPF.

The Local Plans of the Bournemouth, Dorset and Poole local authorities include policies for the protection of employment land and the delivery of projected employment land requirements over their respective plan periods. The employment land protection policies vary between each local authority in terms of their flexibility for the consideration of proposals for Non-B-use classes on employment land.

COMMERCIAL PROPERTY MARKET REVIEW

A commercial property market analysis has been undertaken for the Dorset LEP area including the Eastern and Western Dorset HMAs. This local assessment has been undertaken in the context of the international and national property markets and has been prepared in consultation with local commercial property agents working in Eastern and Western Dorset.

The UK economy has experienced significant growth since the 2008 economic downturn, although growth forecasts have recently been downgraded in relation to slowing global and European markets. On a national basis, The RICS Commercial Market Survey (Q1 2015) identifies an increased growth and demand for offices and industrial premises and a shortage of supply.

Within the Dorset LEP area, commercial property market areas have been defined which constitute natural property market areas that form linkages between settlements, land use types and highways infrastructure. The identification of these commercial market areas and main market centres for office and industrial development have been established through engagement with local commercial agents and through discussion with local authorities in the Dorset LEP area. The main market centre for office in the Dorset LEP area is located in Bournemouth and Poole with supporting roles performed by Bournemouth Airport Business Park and Ferndown Industrial Estate. The main market centre for industrial in the Dorset LEP area is in Eastern Dorset and includes Bournemouth Airport Business Park, Ferndown Industrial Estate (East Dorset), Woolsbridge Industrial Estate (East Dorset), Ebblake Industrial Estate (East Dorset), Dorset Green Technology Park (Winfrith), Holton Heath (Purbeck), Wallisdown and West Howe (Bournemouth). However, there is also a key industrial centre in Western Dorset located at the Granby Industrial Estate in Weymouth which also performs a significant role for the Dorset LEP area. This assessment of the commercial property market provides an understanding of the natural property market areas and location of main market centres for office and industrial development that is fundamental in informing the strategic planning process and options for the future distribution of employment land in the Dorset LEP area to meet future market requirements.

In Eastern Dorset, local agents consider that there is currently insufficient employment land and premises of the right type, quality and appropriate location to meet the needs of the market in the short term, despite the fact that there is a considerable amount of employment land supply in Eastern Dorset to address projected requirements. This is in contrast to Western Dorset where local agents state that the availability of employment land and premises is adequate to meet current market requirements. This reflects the overall difference between the Eastern and Western Dorset commercial markets with higher levels of market demand for employment land in Eastern Dorset. The deliverability of key strategic sites in the Dorset LEP area is being addressed by local authorities and the Dorset Local Enterprise Partnership through securing funding from sources such as the Growth deal to ensure sufficient employment land is immediately available to meet the needs of the market.

Over the next 5 - 10 years agents consider that demand for office and industrial space will increase in Eastern Dorset, mainly within the defined office and industrial market centres. In Western Dorset, the office market is not predicted to grow substantially over the next 10 years, and moderate growth is anticipated in the industrial sector over this period.

In addition to the supply of employment land and premises, other factors have a significant impact upon prospects for inward investment and economic growth in Eastern and Western Dorset. Key factors include the availability of finance, limited supply of affordable housing, relatively poor access to the strategic road network and the need for strategic highways infrastructure improvements. In particular, strategic road access and investor perception of highways infrastructure requirements is a limiting factor compared with other areas to the east such as Southampton.

SOCIO-ECONOMIC CONTEXT

The Social Economic context analysis assesses the performance of Eastern and Western Dorset labour markets in relation to the national context. Overall, both Housing Market Areas perform relatively well in labour market terms in relation to the national context, with Eastern Dorset performing more strongly.

Eastern Dorset has a higher working age population (16-64) than Western Dorset but slightly lower than the national average. The population for the Dorset LEP area is projected to increase by 6% which is below the national level projection. The Eastern Dorset population is projected to increase in line with the national projection while Western Dorset is facing a decline in the working age population.

In the Dorset LEP area four-fifths of 16-64 years olds are economically active. The percentage of economically active individuals in Eastern Dorset is in line with the national picture but marginally lower than Western Dorset.

The employment rates in Eastern and Western Dorset are broadly in line with each other and above the national level. The unemployment rate in the Dorset LEP area at 3.4% is significantly below the national rate of 5.3%.

The percentage of employees in high skilled occupations is below average in Dorset and lower in Eastern Dorset, with Western Dorset in line with the national average. However, In Eastern Dorset, professional occupations are the highest in the Dorset area and in line with the national average, while in Western Dorset associate professionals and technical occupations are highest and more in line with the national average.

The distribution of skilled residents varies across the Dorset LEP area. Highly skilled residents are more highly represented in Eastern Dorset where there is a higher proportion than the national average.

Within the Dorset LEP area, there are a greater number of employees in Eastern Dorset (over 250,000) than in Western Dorset (almost 67,000) however the ratio of employees to population is quite similar. Across the Dorset LEP area as a whole, dominant sectors include Wholesale and Retail Trade and Human Health and Social Work Activities. Eastern Dorset has a larger proportion of employees in Manufacturing and Advanced Manufacturing / Engineering although these sectors are also relatively strong in Western Dorset. Western Dorset has a larger proportion of employees in the Tourism and Leisure, Accommodation / Food Services and Education sectors than in Eastern Dorset. There are significant levels of employment in the knowledge based sectors of Professional, Scientific and Technical Services (8% in Western Dorset) and Advanced Manufacturing/Engineering (6% in Eastern Dorset).

Eastern Dorset (250,300 employees)	Western Dorset (66,800 employees)
Wholesale and Retail Trade (17%)	**Wholesale and Retail Trade (16%)**
Human and Health and Social Work Activities (15%)	**Human and Health and Social Work Activities (17%)**
Manufacturing (9%)	Manufacturing (8%)
Education (9%)	**Education (10%)**
Accommodation / Food Services (9%)	**Accommodation / Food Services (12%)**
Tourism and Leisure (8%)	**Tourism and Leisure (10%)**
Professional, Scientific & Technical Activities (6%)	Professional, Scientific & Technical Activities (8%)
Advanced Manufacturing / Engineering (6%)	Advanced Manufacturing / Engineering (3%)
Creative Industries (3%)	Creative Industries (2%)

Table .1 Employment Distribution (Largest Sectors) (Source - Business Register and Employment Survey ONS 2014)

In Eastern Dorset there is the highest business representation in construction, wholesale / retail and motor, real estate and professional, scientific and technical activities. In Western Dorset there is highest business representation in agriculture, forestry and fishing, construction, wholesale / retail / motor, accommodation and food services and professional, scientific and technical activities.

Eastern Dorset	Western Dorset
Agriculture, Forestry and Fishing (4.2%)	**Agriculture, Forestry and Fishing (13.2%)**
Production (6.4%)	Production (5.6%)
Construction (13.2%)	**Construction (10.3%)**
Wholesale / Retail / Motor (18.1%)	**Wholesale / Retail / Motor (17.2%)**
Transport and Storage (2.3%)	Transport and Storage (1.9%)
Accommodation & Food Services (6.5%)	**Accommodation & Food Services (8.6%)**
Information and Communications (6.6%)	Information and Communications (3.6%)
Finance and Insurance (2.1%)	Finance and Insurance (1.3%)
Real Estate (14.1%)	Real Estate (3.5%)
Professional, Scientific & Technical Activities (13.2%)	**Professional, Scientific & Technical Activities (11.4%)**
Administration and Support (7.5%)	Administration and Support (6.2%)
Public Administration and Defence (0.8%)	Public Administration and Defence (1.5%)
Education (2.3%)	Education (2.1%)
Health and Social Work (5.8%)	Health and Social Work (6.1%)
Arts / Entertainment / Recreation (6.9%)	Arts / Entertainment / Recreation (7.6%)

Table .2 Business Sector Distribution (% of Businesses by HMA), (Source - UK Business Counts, ONS, 2015)

Over the period 2013-2033, in the Dorset LEP area, the Trend (baseline) employment growth scenario indicates expected growth in the number of FTEs of 31,200 which equates to about 0.5% per annum growth in FTE employment – compared with about 0.6% pa nationally. In this twenty year period, GVA growth of 2.1% per annum is expected locally – compared with just under 2.0% pa nationally.

Using the Trend Scenario to look at full time equivalent job growth in the Dorset LEP area, the most significant growth will be in construction with further significant growth in business/ professional services; accommodation & food services; financial & insurance; residential & social care; and health – all with growth of more than 2,000 FTEs over the period. This pattern of job creation is echoed in the Eastern Dorset area, but is slightly different in Western Dorset where the financial & insurance sector is of less significance. In the DLEP area as a whole, FTE shrinkage is most likely to occur in wholesale & retail with further significant losses in education and manufacturing. Although there are projected losses in FTEs within manufacturing, it is important to note that this Workspace Strategy identifies growth in industrial uses as this category incorporates a much broader range of employment sectors other than manufacturing.

EMPLOYMENT LAND DEMAND

The Workspace Strategy has tested 4 growth scenarios based on the Cambridge Econometrics Local Economy Forecasting Model (LEFM, 2015) combined with different levels of local housing growth identified from current adopted Local Plan housing targets and also the full objectively assessed housing need identified from the Eastern and Western Dorset Strategic Housing Market Assessments (SHMAs, 2015, 2014). Each of the 4 growth scenarios has also been tested with allowances of 10% and 20% for flexibility to provide further choice to the market over and above baseline employment land projection figures.

In the Dorset LEP area, and for the Eastern Dorset HMA, 70% of demand is for industrial uses including B1c, B2 and B8 use classes and 30% of demand is for B1 office over the study period 2013 - 2033. The split in demand is slightly different for the Western Dorset HMA with 78% of demand for industrial uses including B1c, B2 and B8 use classes and 22% of demand for B1 office uses over the study period. Overall, approximately 80% of future demand for employment land for the Dorset LEP area is in the Eastern Dorset HMA and 20% of demand in the Western Dorset HMA.

The 4 growth scenarios tested as part of this study and associated projections for employment land are set out below:

1. **Trend Scenario (Baseline / + 10% / + 20%):** This baseline scenario is based on the 2011 Census of Population workplace based employment data by district, unitary authority and by industrial sector. Employment growth rates from the Cambridge Econometrics LEFM for Dorset (2015) have then been

applied with some adjustments for local knowledge, particularly in sectors showing stronger growth than would be expected in Dorset. This scenario identifies the following projections for employment land:

- **Bournemouth, Dorset and Poole: 170.5ha (Baseline), 180.5ha (10% Flexibility), 190.5ha (20% Flexibility).**
- **Eastern Dorset: 140.7ha (Baseline), 149.6ha (10% Flexibility), 158.5ha (20% Flexibility).**
- **Western Dorset: 29.8ha, 30.9ha (10% Flexibility), 32ha (20% Flexibility).**

2. **Planned Growth Scenario (Baseline / + 10% / + 20%):** The baseline for this scenario is the 2011 Census of Population workplace based employment data by district / unitary authority and by industrial sector. The housing data is based on current adopted Local Plan housing trajectories (as of April 2016) until the end of the current respective Local Plan periods. Beyond the end of current Local Plan periods the average objectively assessed needs (OAN) are applied from the 2014, 2015 SHMAs to 2033. This scenario identifies the following projections for employment land:

- **Bournemouth, Dorset and Poole: 222.4ha (Baseline), 237.6ha (10% Flexibility), 252.8ha (20% Flexibility).**
- **Eastern Dorset: 172.7ha (Baseline), 184.8ha (10% Flexibility), 196.9ha (20% Flexibility).**
- **Western Dorset: 49.7ha (Baseline), 52.8ha (10% Flexibility), 55.9ha (20% Flexibility).**

3. **Accelerated Growth Scenario (Baseline / + 10% / + 20%):** The baseline for this scenario is the 2011 Census of Population workplace based employment data by district / unitary authority and by industrial sector. In Eastern Dorset, employment land projections are based on current adopted Local Plan housing trajectories (as of April 2016) to the point at which it is anticipated revised Local Plans will be in place. In Eastern Dorset, revised Local Plans are anticipated to be in place by April 2019 in Bournemouth, Christchurch & East Dorset and by 2018 in Poole, Purbeck and North Dorset. In Eastern Dorset, existing Local Plan figures are applied to the point when revised plans are in place, from this point onwards until 2033 the average objectively assessed needs from the 2015 Eastern Dorset SHMA are applied. In Western Dorset, the current adopted Local Plan housing figures have been applied (which are based on the OAN requirements from the 2014 Western Dorset SHMA) with a small increase in housing above the Planned Growth Scenario for the years 2029/30, 2030/31 to take account of a slight increase in housing in Dorchester and Sherborne. This scenario identifies the following requirements for employment land:

- **Bournemouth, Dorset and Poole: 233.9ha (Baseline), 250.2ha (10% Flexibility), 266.6ha (20% Flexibility).**

- **Eastern Dorset: 183.7ha (Baseline), 196.9ha (10% Flexibility), 210.1ha (20% Flexibility).**
- **Western Dorset: 50.2ha (Baseline), 53.3ha (10% Flexibility), 56.4ha (20% Flexibility).**

4. **Step Change Scenario (Baseline / + 10% / + 20%) :** The baseline for this scenario is the 2011 Census of Population workplace based employment data by district / unitary authority and by industrial sector. In Eastern Dorset, employment land projections are then based on current adopted Local Plan housing trajectories (as of April 2016) to the point at which it is anticipated revised Local Plans will be in place. In Eastern Dorset revised Local Plans are anticipated to be in place by April 2019 in Bournemouth, Christchurch & East Dorset and by 2018 in Poole, Purbeck and North Dorset. From this point onwards, the full OAN housing from the Eastern Dorset 2015 SHMA are applied. In Western Dorset, the current adopted Local Plan housing figures have been applied (which are based on the OAN requirements from the 2014 Western Dorset SHMA) with a small increase in housing above the Planned Growth Scenario for the years 2029/30, 2030/31 to take account of a slight increase in housing in Dorchester and Sherborne. This scenario identifies the following requirements for employment land:

- **Bournemouth, Dorset and Poole: 244.3ha (Baseline), 261.7ha (10% Flexibility), 279.1ha (20% Flexibility).**
- **Eastern Dorset: 194.1ha (Baseline), 208.4ha (10% Flexibility), 222.7ha (20% Flexibility).**
- **Western Dorset: 50.2ha (Baseline), 53.3ha (10% Flexibility), 56.4ha (20% Flexibility).**

EMPLOYMENT LAND SUPPLY

The employment land demand scenarios set out above have been balanced against employment land supply in the Dorset LEP area and the Eastern and Western Dorset HMAs over 5 year phasing periods from 2013 to 2033. For the purposes of this study the following 2 employment land supply scenarios have been applied:

1. **Employment Land Supply Scenario 1:** This scenario includes current employment land supply which has been identified by the Dorset LEP area local authorities and includes all existing Local Plan employment sites (including existing allocations) and other employment sites identified through employment land reviews that are available to the market. This has identified the following employment land supply:

- **Bournemouth, Dorset and Poole - 340ha**
- **Eastern Dorset - 276ha**
- **Western Dorset - 64ha**

2. **Employment Land Supply Scenario 2:** This scenario includes the sites identified in Employment Land Scenario 1 with the addition of further sites currently being considered through Local Plan reviews which

have the potential to be formally allocated and form part of the land supply over the study period to 2033. This scenario includes an additional 30ha of land in the Borough of Poole and approximately a further 27ha of land in Purbeck District which reflects option sites currently being considered as part of their Local Plan review process. This has identified the following employment land supply:

- **Bournemouth, Dorset and Poole - 397ha**
- **Eastern Dorset - 333ha**
- **Western Dorset - 64ha**

Of the total 340ha identified in Employment Land Scenario 1, 100ha of land is available in the short term and developable in the next 2 years and 110ha of land is available in the medium term and is projected to come forward within the next 3-5 years. The remaining 130ha is likely to come forward in the long term in over 5 years' time. This phasing of land availability is based on current assessments of the period of time for a site to be developed. There is potential for a higher rate of development to come forward in the short to medium term dependant on a range of factors including market demand, land owners bringing sites forward and the phasing of key infrastructure improvements.

In Eastern Dorset there is an employment land supply of 276ha which constitutes over 80% of the total available employment land for the Dorset LEP area. Of the 276ha available in Eastern Dorset, 83ha (30%) is projected to come forward in the short term (0-2 years), 92ha (33%) in the medium term (3-5 years) and 101 ha (37%) in the long term (5 Years +).

In Western Dorset there is an employment land supply of 64ha which constitutes 19% of the total available employment land supply for Eastern and Western Dorset. Of the 64ha available in Western Dorset, 17ha (27%) of land is projected to come forward in the short term (0-2 years), 17ha (27%) in the medium term (3-5 years) and 29ha (46%) in the long term (5 Years +).

Across Eastern and Western Dorset, there are 9 very large employment sites (>10ha) which account for 170ha (50%) of the total employment land supply. Eight of the 9 sites are located in Eastern Dorset and account for 158ha (46%) of total employment land supply. There are 21 large sites (2 - 9.99 ha) in Eastern and Western Dorset which accounts for 114ha (33%) of total available employment land supply. Of these large sites which total 114ha, 76ha is located in Eastern Dorset and accounts for 22% of total available employment land. There are also 69 sites below 2ha which account for 56ha (16%) of total available employment land in Eastern and Western Dorset.

The sites that comprise the 340ha (Employment Land Scenario 1) are considered to be deliverable over the study period to 2033. A programme of highways improvements has been identified and received funding for the B3073 Corridor which will help facilitate development of the remaining development potential at Bournemouth Airport Business Park. The full development potential of the Airport Business park had not been included in the previous Workspace Strategy due to highways infrastructure constraints.

Dorset Green Technology Park has recently received Enterprise Zone status and now includes over 50 ha of land, of which 30 - 40ha of land may currently be developed over the study period to 2033.

BALANCING DEMAND AND SUPPLY

Over the study period from 2013 - 33 and across all the employment land projection scenarios there is an overall balance between the demand and supply of employment land for the Dorset LEP area including Eastern and Western Dorset. At the higher end the Step Change Scenario with 20% flexibility identifies an employment land projected requirement of 279ha for the Dorset LEP area which is balanced against an employment land supply of 340ha (Employment Land Supply Scenario 1). In this scenario there is a 60.9ha surplus in supply over and above this projected requirement for the Dorset LEP area. This Step Change Scenario also identifies a projected requirement of 222.7ha for Eastern Dorset which is balanced against an employment land supply of 276ha in this area, which gives 53.3ha surplus of supply. In Western Dorset this scenario identifies a projected requirement of 56.4ha which is balanced against an employment land supply of 64ha which provides a surplus in supply of 7.6ha.

Through Local Plan reviews there may be further employment land that will come forward as considered through Employment Land Supply Scenario 2 which adds an additional supply of approximately 57ha in Eastern Dorset through sites considered in the Borough of Poole and Purbeck Local Plan reviews.

Although employment land demand and supply is in balance for the Dorset LEP area (including the Eastern and Western Dorset HMAs) with some surplus, it is important that employment land is delivered commensurate with future market requirements within the commercial property market areas and main centres for office and industrial. In this respect the the main office market is located in Bournemouth and Poole town centres with supporting roles performed by Bournemouth Airport Business Park and Ferndown Industrial Estate. Employment land supply in Bournemouth and Poole in particular needs to ensure that there is sufficient supply to meet projected requirements for B1 office. The main industrial market is also in Eastern Dorset within Poole, Bournemouth, Christchurch Borough and on strategic employment sites in Purbeck and East Dorset districts. There is also a key industrial centre in western Dorset, located on the Granby Industrial Estate, Weymouth. It is important that sufficient land comes forward to meet market requirements at the right time within these industrial centres in Eastern and Western Dorset.

SUMMARY & RECOMMENDATIONS

In terms of the 4 employment growth scenarios tested through the Workspace Strategy it is recommended to take forward the **Step Change growth scenario at 20% Flexibility**. The Step Change growth scenario is considered the most appropriate scenario as it is fully compliant with the NPPF in terms of testing the impact of the full objectively assessed housing need for the Eastern and Western Dorset HMAs identified through the Eastern and Western Dorset SHMAs (2015, 2014). It is considered appropriate to take forward the Step Change Scenario with 20% flexibility over and above the baseline projection in order to provide sufficient flexibility in the range and choice of employment sites available to the market. This approach also reflects comments received by commercial property agents in Eastern and Western Dorset regarding the need to provide an adequate supply of employment land that is available in the short term through the provision of additional land supply over and above the baseline requirement. Adopting the 20% flexibility scenario will also help to address any issues in the timing of delivery of land on large sites of strategic economic significance in Eastern and Western Dorset.

As concluded above, in taking the Step Change Scenario forward there is currently a balance between employment land demand and land supply across the Dorset LEP area and the Eastern and Western Dorset HMAs. In terms of the delivery of Employment Land Supply Scenario 1, this provides sufficient quantity of employment land of the right type, in the right location and suitably available to meet the needs of the market over the study period to 2033.

The main market centres for office are located in Eastern Dorset in Bournemouth and Poole with supporting roles performed by Bournemouth Airport Business Park and Ferndown Industrial Estate. In meeting the increased demand for office accommodation (30% of overall demand) over the study period to 2033, it is important that there isn't significant losses in the existing stock of office accommodation, particularly in Bournemouth and Poole. There must also be sufficient capacity to meet future needs for B1 office within these areas with support from other business parks in Eastern Dorset. It is currently considered there is sufficient capacity in Eastern Dorset to meet future office demands for this HMA but this is dependant on minimising any net loss of employment land suitable to meet market requirements for B1 office use.

The main market centres for industrial development are located in Eastern Dorset with strategic business parks located in the Borough of Poole, Christchurch, East Dorset, Purbeck and Bournemouth. However, there is also a key industrial centre in Western Dorset located on the Granby Industrial Estate in Weymouth. It is considered that there is currently adequate employment land supply in Eastern Dorset in the key market areas to meet current and projected market requirements for industrial development in relation to the Step Change growth scenario with 20% Flexibility. This provides a sufficient range and choice of sites which are suitably available to meet market requirements in the short term within this HMA, as the centre of the industrial market for Bournemouth, Dorset and Poole.

The Western Dorset HMA does not contain any of the main market centres for office but includes a key industrial area on the Granby Industrial Estate. Twenty percent of the overall future demand for employment land for the Dorset LEP area (56.4ha, Step Change, 20%) is required to be delivered in Western Dorset. It is considered that the current employment land supply of 64ha provides a sufficient quantity of land in the right location and appropriate availability to meet future requirements over the study period to 2033.

1 Introduction

BACKGROUND

1.1 The local authorities of Bournemouth, Dorset and Poole in association with the Dorset Local Enterprise Partnership (LEP) have prepared a revised Workspace Strategy for the Dorset LEP area which includes the Eastern and Western Dorset Housing Market Areas (HMAs). This Workspace Strategy supersedes the 2008 Workspace Strategy and 2012 Workspace Study.

1.2 A revised strategy is required in order to provide updated employment land projections and business sector forecasts to take account of changes in the economic context since the preparation of the 2008 and 2012 workspace studies.

1.3 The updated strategy is also necessary as a shared evidence base to inform the review of the Dorset Strategic Economic Plan (SEP), informal strategic planning undertaken between Dorset authorities, Local Plans and Employment Land Reviews. The informal strategic planning process and work undertaken between local authorities through the Duty to Co-operate will inform the future distribution of employment land across Bournemouth, Dorset and Poole to 2033. This will help to ensure the delivery of sufficient employment land and premises of the right type and in the right location to meet the future needs of the economy for the Dorset LEP area including the Eastern and Western Dorset HMAs.

1.4 The Workspace Strategy is integral to achieving the objectives of the Dorset SEP and aspirations for economic growth across the Dorset LEP area. The SEP for Dorset produced by the Dorset Local Enterprise Partnership (LEP) **'Transforming Dorset'** was published in March 2014.

1.5 The SEP recognises that Dorset is not as productive as it could be and the area is characterised by a relatively low wage economy. The SEP sets out a vision to establish a step change in the Dorset economy through investment in infrastructure and skills. This includes extensive plans for economic growth including the delivery of key infrastructure to facilitate economic growth on strategic sites such as Bournemouth Airport Business Park and the Port of Poole.

1.6 The strategy aims to establish a new economy that is more competitive, global and digitally driven. The economy will be dependent on skilled employees working across advanced engineering, knowledge intensive industries, finance, professional services, new technologies, health and social care. In order to support growth the SEP identifies the need to secure the delivery of sufficient employment land to meet the needs of local business and inward investment.

THE BRIEF

1.7 The primary aim of the strategy is to ensure the delivery of sufficient employment land and premises of the right type and quality and in the right location to meet the future needs of the economy. The preparation of the Workspace Strategy has been predicated on a robust, market facing assessment of the demand for and supply of employment land, sites and premises in the Dorset LEP area.

1.8 The overarching objectives of the Workspace Strategy are as follows:

1. To establish employment Land projections for the Dorset LEP area and the Eastern and Western Dorset HMAs (as functional economic areas) for B1, B2 and B8 use classes to 2033.
2. To balance employment land demand / supply and provide recommendations regarding the provision and distribution of land and premises across the Dorset LEP area and Eastern and Western Dorset HMAs.

METHODOLOGY

Time Horizon

1.9 This study looks at the projected requirement for employment land over the time horizon 2013-2033. This time horizon is consistent with the period used for the 2014 and 2015 Strategic Housing Market Assessments (SHMAs) for Western and Eastern Dorset and is also broadly in line with Local Plan periods of the Bournemouth, Dorset and Poole local authorities.

Study Area

1.10 The Dorset LEP area includes Dorset County and the two unitary authorities of Bournemouth and Poole. Dorset County contains the following six districts:

- Christchurch Borough
- East Dorset District
- North Dorset District
- Purbeck District
- West Dorset District
- Weymouth and Portland Borough

1.11 For the purposes of the Workspace Strategy employment land projections have been produced for the Dorset LEP area and for the Eastern and Western Dorset HMAs as functional economic areas. The HMAs are comprised of the following local authority areas:

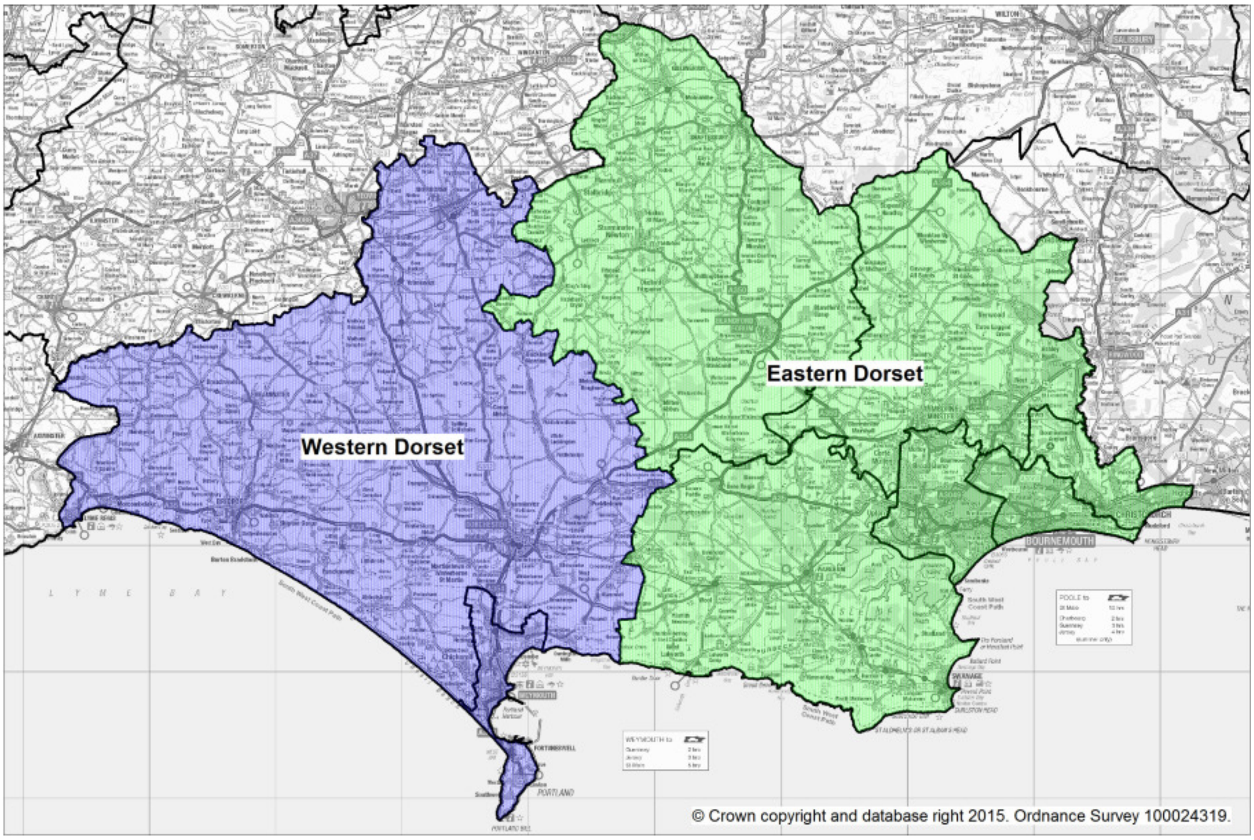
Eastern Dorset

- Bournemouth Borough
- Borough of Poole
- Christchurch Borough
- East Dorset District
- North Dorset District
- Purbeck District

Western Dorset

- West Dorset District
- Weymouth and Portland Borough

1.12 This geographical approach provides consistency with the Eastern and Western Dorset SHMAs (2015/2014) and enables alignment between employment land projections and objectively assessed needs (OAN) for housing.

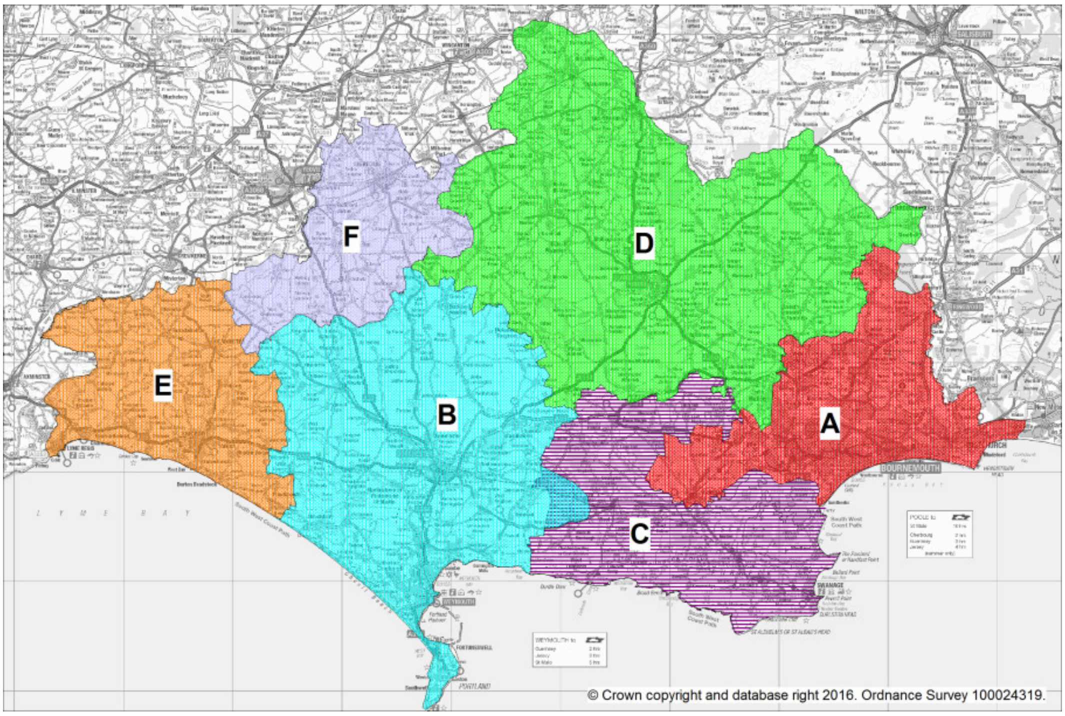


Map 1.1 Housing Market Areas

1.13 The Workspace Strategy has also identified distinct commercial property market areas and centres for office and industrial within the Dorset LEP area in order to provide a more fine grained analysis of geographical market areas to inform the future distribution of employment land. The following commercial property market areas have been identified in consultation with local authorities and commercial property agents in Eastern and Western Dorset:

Commercial Property Market Areas
A: Eastern Dorset: including Bournemouth, Poole, Christchurch, Bournemouth Airport Business Park, Ferndown, Wimborne, Woolsbridge Industrial Estate (3 Legged Cross) and Ebblake Industrial Estate (Verwood), Holton Heath, Upton, Wareham, Wallisdown/West Howe;
B: Dorchester, Weymouth and Portland, Winfrith (Dorset Green Technology Park - *note this is also in C*).
C: Winfrith (Dorset Green Technology Park), Swanage and other parts of Purbeck.
D: Blandford Forum, Sturminster Newton, Shaftesbury, Gillingham and other parts of North Dorset.
E: Bridport, Lyme Regis, Beaminster.
F: Sherborne and surrounds (with influence / linkages to Yeovil).

Table 1.1 Commercial Property Market Areas

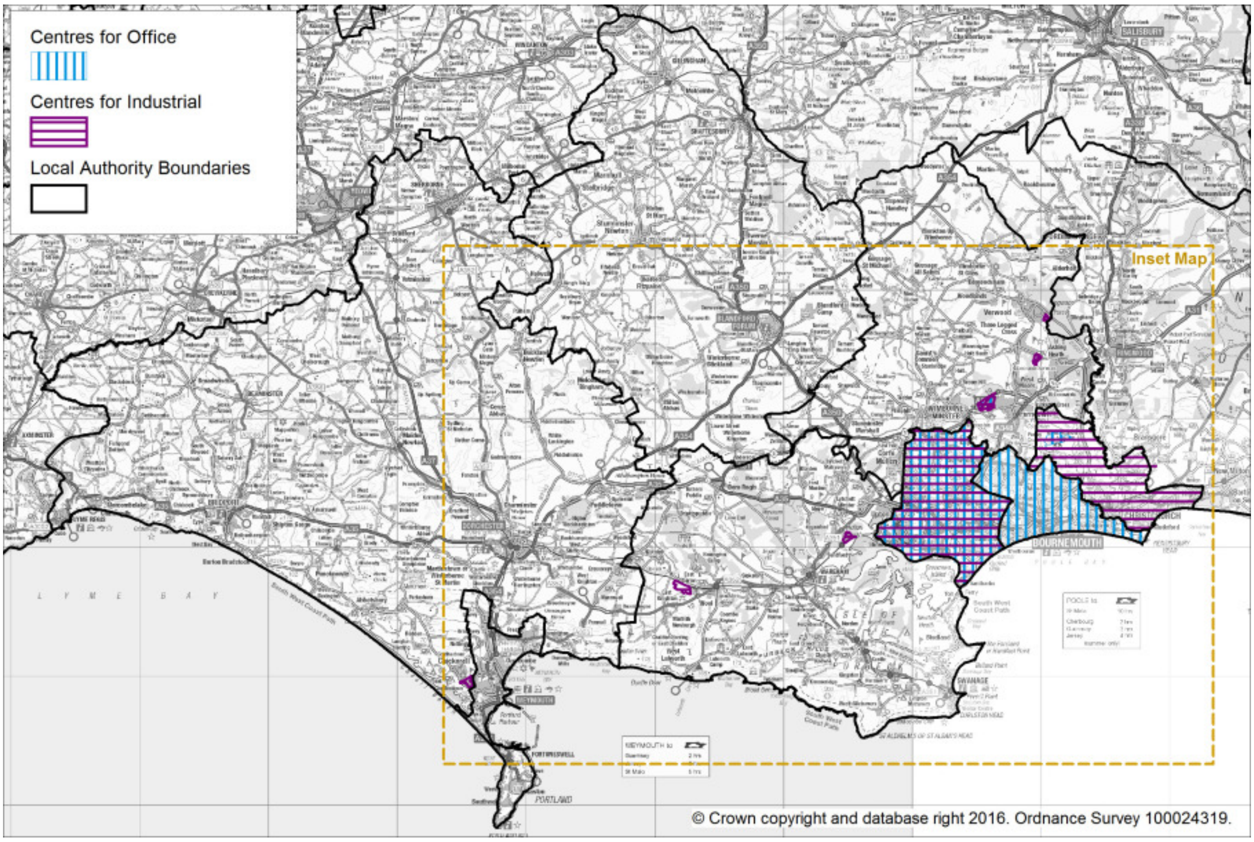


Map 1.2 Commercial Property Market Areas

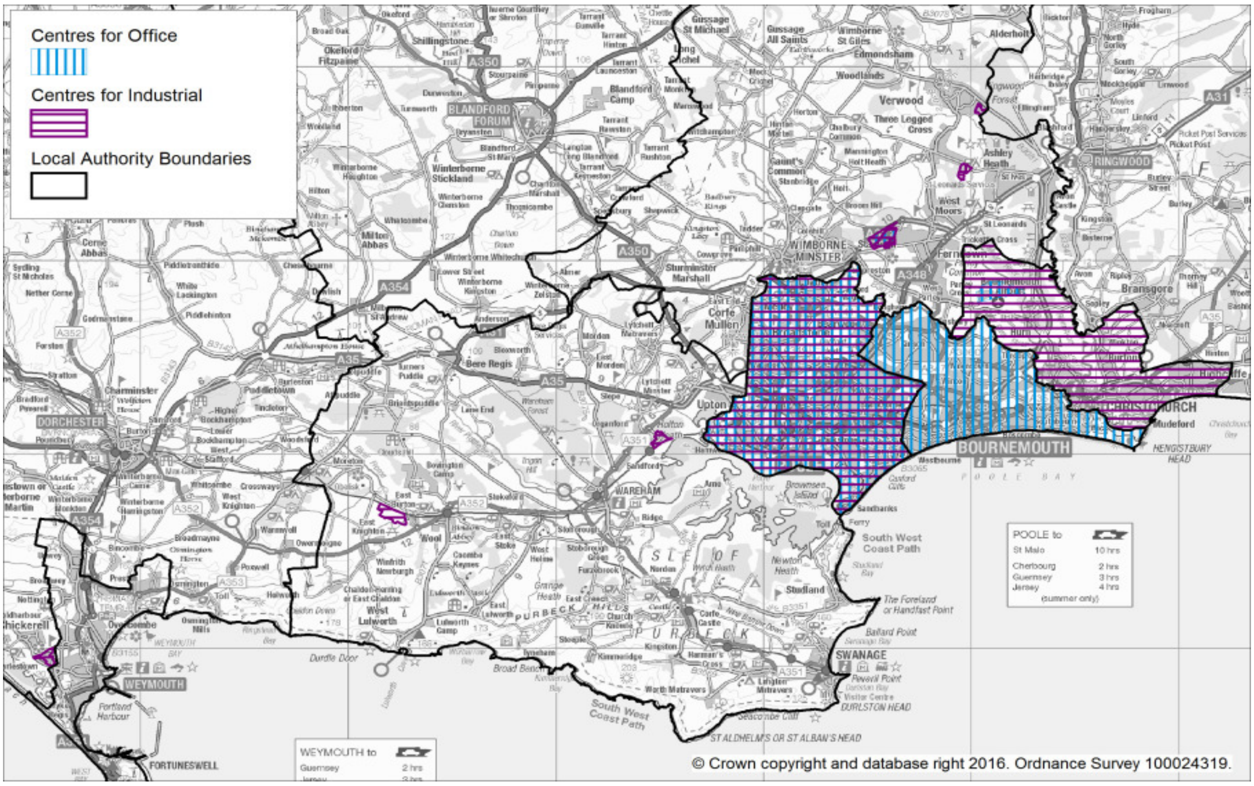
1.14 The following geographical areas have been identified across the Dorset LEP area as the main market centres for office and industrial development:

Centres for Office and Industrial
A: Office – Bournemouth and Poole with supporting roles of Bournemouth Airport Business Park and Ferndown Industrial Estate.
B: Industrial – Poole, Bournemouth Airport Business Park, Christchurch, Ferndown Industrial Estate, Woolsbridge (3 Legged Cross), Ebblake Industrial Estate (Verwood), Dorset Green Technology Park, Holton Heath Trading Park, Wallisdown / West Howe and the Granby Industrial Estate, Weymouth.

Table 1.2 Centres for Office and Industrial



Map 1.3 Centres for Office and Industrial (Dorset)



Map 1.4 Centres for Office and Industrial (Enlarged Inset)

Definition of Employment Land and Land Use Types

1.15 In relation to land uses, the Workspace Strategy focuses on employment land which in planning terms is defined as Office (B1a), Research and Development (B1b), Light Industry (B1c), General Industry (B2) and Warehousing (B8). To allow consistency between different data sources these uses have been grouped into the following three land use types:

- Office (B1a/b)
- Other Business Space (B1c, B2)
- Warehousing (B8)

1.16 However, a significant part of current employment and projected employment growth is in sectors which to a large degree do not occupy B-use-class workspace. In the Workspace Strategy employment sectors which are predominantly not operating from B-use-class land types are referred to as Non-B-Use-Class employment. Examples of Non-B-Use-Class sectors that are important for the local economy include education, health and leisure uses.

1.17 Demand from Non-B-Use-Class employment is not translated into future land requirements as part of the Workspace Strategy. The main reason for this is that there is not an established methodology for calculating Non-B use class requirements. However the strategy does give some regard to Non-B Use Class employment.

Base Date for Local Authority Data

1.18 This report has a base date of 1st November 2015. All figures submitted by local authorities that have been fed into the model were true and accurate at the time. Any change in these figures since this date is attributed to the progression of the relevant local authority's respective local plans or further information coming to light concerning individual sites. Where this is not the case the relevant date will be stated.

REPORT STRUCTURE & APPROACH

1.19 The Workspace Strategy has been prepared collaboratively with the involvement of the unitary authorities of Bournemouth and Poole, the six Dorset local authorities and the Dorset Local Enterprise Partnership. During preparation of the Strategy there have been regular meetings of the steering group involving all the Dorset local authorities and the Dorset LEP.

1.20 **Chapter 2** sets out the **policy context** and reviews relevant national and local policy and assesses the current employment policies included in the Local Plans of the Bournemouth, Dorset and Poole local authorities.

1.21 **Chapter 3** provides a **commercial property market analysis** of the current and future performance of the office and industrial markets across the study area. This has been produced using property data, local knowledge and through consultation with local property agents. Meetings were held in Eastern and Western Dorset to engage with local agents concerning property markets and future requirements for employment land and premises. A questionnaire regarding the property market and future provision of employment was also issued to a range of commercial agents acting across the Dorset LEP area.

1.22 **Chapter 4**, provides an analysis of the **socio-economic context** and uses a range of data sources including the economic forecast for the South West Region based on forecast data provided by Cambridge Econometrics.

1.23 **Chapter 5** addresses **employment land demand** and provides 4 growth scenarios with corresponding employment land projections. A detailed description of the forecasting approach and methodology is also set out within this chapter.

1.24 **Chapter 6** sets out **employment land supply** phased over 5 year periods from 2013 – 2033 which has been provided by the local authorities. Each authority has provided a schedule of their portfolio of employment sites with detail of availability and delivery trajectory.

1.25 **Chapter 7 balances employment land supply and demand** providing an analysis of the balance between employment land demand and supply in quantitative and qualitative terms. Chapter 8 provides a summary and recommendations from this assessment.

1.26 **Chapter 8 summary and recommendations,** sets out an assessment of the employment land growth scenarios which have been tested through the Workspace Strategy and also provides an evaluation of the implications of progressing each of these options through Local Plans. This chapter also provides an analysis of the implications of the growth scenarios for the current and future provision of employment land across the Dorset LEP area and the Eastern and Western Dorset HMAs. Decisions regarding the future distribution of employment land will be informed by this Workspace Strategy and determined through the strategic planning process, Duty to Co-operate and through Local Plan production.

Summary of Methodology for Estimating Employment Land Demand

A: Projections for employment growth 2013 - 2033 - give

Employment Demand

|

B: Employment demand is converted to Land Use Class (LUC)

(Office, Other business, Warehousing)

|

C: Employment demand by LUC is converted to

Floorspace Requirement

using worker densities by LUC (FTE per sq m)

|

D: Floorspace requirement is converted to a

Baseline Land Requirement (ha)

using plot ratios by LUC

|

Allowances are then added:

E: Windfall losses

Employment land likely to be lost to non-B use

is projected based on the median over the last eleven years

+

F: Churn

Vacant land required for smooth market function is estimated using the

annual average net take-up of employment land: two year allowance

+

G: Land Requirement:

Scenario testing

2 Policy Context

2.1 The following chapter sets out the planning policy and economic development context for the Workspace Strategy by examining national and local policy and economic development strategies which determine the approach to economic development, and the protection of existing employment land and premises.

NATIONAL PLANNING POLICY AND GUIDANCE

2.2 The achievement of strong, sustainable economic growth is a central policy objective of Government. The commitment to securing economic prosperity and creating an environment in which enterprise can flourish, can be evidenced through changes to the planning system aimed at 'cutting red tape' by streamlining national planning policy and placing local plans at the heart of development and growth.

2.3 However, there is strong competition for development land, particularly from housing which also enjoys support through central government policy. This is demonstrated through permitted development changes, introduced in April 2013, to allow the conversion of underused office premises to deliver new homes. Further proposed reforms will allow light industrial (use class B1c) and warehouse premises (use class B8) to be similarly converted.

2.4 Whilst these reforms clearly impact on some forms of land and premises currently used for employment, there is still a clear requirement, at both a national and local level, to ensure that an adequate supply of employment land is provided that contributes towards delivering economic growth and creating sustainable communities.

2.5 The National Planning Policy Framework (published March 2012) and Planning Practice Guidance (published March 2014), provide national policy and guidance in respect of economic development, the relevant aspects of which are set out below.

NATIONAL PLANNING POLICY FRAMEWORK (NPPF)

2.6 The NPPF states that the ***"purpose of the planning system is to contribute to the achievement of sustainable development."*** The three dimensions to sustainable development are economic, social and environmental, with the economic role defined as:-

2.7 ***"contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure."***

2.8 The NPPF sets out the Government's commitment to securing economic growth to create jobs and prosperity and the significant weight that should be placed on the need to support economic growth through the planning system. Planning should operate to encourage sustainable growth and not act as an impediment to it.

2.9 Amongst the core land-use planning principles included in the NPPF is the expectation that planning should ***"pro-actively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs".***

2.10 The NPPF states that local authorities are encouraged to plan pro-actively to meet the development needs of business and that investment should not be over-burdened by the combined requirements of planning policy expectations. Local Plan policies should recognise and seek to address potential barriers to investment (i.e. lack of infrastructure, services and housing).

2.11 Paragraph 22 of the NPPF also states that planning policies should avoid the long-term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Land allocations should be regularly reviewed. Where there is no real prospect of a site being used for the allocated employment use, applications for alternative uses on such sites should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities.

PLANNING PRACTICE GUIDANCE (PPG)

2.12 The Government's PPG provides guidance on a national level for how councils should approach the assessment of their housing and economic development needs and the availability of land for housing and economic development.

Housing and Economic Development Needs Assessment

2.13 Guidance set out in the PPG supports local planning authorities in objectively assessing and evidencing development needs for housing and economic development (which includes main town centre uses).

2.14 From an economic perspective, the primary objective of assessing need is to:-

- identify the future quantity of land or floorspace required for economic development uses including both the quantitative and qualitative needs for new development; and
- provide a breakdown of that analysis in terms of quality and location, and to provide an indication of gaps in current land supply.

2.15 Local planning authorities should assess their housing and employment development needs working with the other local authorities in the relevant housing market area or functional economic market area, in line with the duty to cooperate, as such needs are rarely constrained by local authority administrative boundaries.

2.16 The assessment of housing and economic development needs includes the Strategic Housing Market Assessment requirement as set out in the NPPF. In this context, the Eastern Dorset SHMA (published 1st December 2015), considers housing need using both trend-based demographic and economic growth potential projections to arrive at the Objectively Assessed Need (OAN) for housing across the Eastern Dorset HMA. As a consequence, the OAN for housing for the East Dorset, North Dorset and Purbeck District Council areas are based on the economic growth projections.

2.17 In Western Dorset for Weymouth and Portland, the Western Dorset SHMA (2014) assessed housing and economic development needs through assessing demographic projections which were tested against 'market signals' in establishing the housing need figure for this HMA. The starting point for establishing the Objectively Assessed Need (OAN) in the Western Dorset HMA was the ONS sub-national population projections. The resultant household projections were converted to labour force projections to see what the impact of the levels of housing growth would have on labour force over the plan period. These labour force projections were tested against projected job growth across the HMA to ensure that the level of housing provision was not restricting local economic growth.

Housing and Economic Land Availability Assessment

2.18 The purpose of an assessment of land availability is to identify a future supply of land which is suitable, available and achievable for housing and economic development uses and is an important step in the preparation of Local Plans. The NPPF identifies the advantages of carrying out land assessments for housing and economic development as part of the same exercise, in order that sites may be allocated for the use which is most appropriate.

2.19 An assessment should:-

- identify sites and broad locations with potential for development;
- assess their development potential;
- assess their suitability for development and the likelihood of development coming forward (the availability and achievability).

2.20 This approach ensures that all land is assessed together as part of plan preparation to identify which sites or broad locations are the most suitable and deliverable for a particular use.

2.21 The assessment forms a key component of the evidence base to underpin policies in development plans for housing and economic development, including supporting the delivery of land to meet identified objectively assessed needs for these uses. The guidance notes acknowledge that not all sites considered in the assessment will be suitable for development, due to matters such as policy constraints or viability. The development plan process will determine which sites are the most suitable to meet housing and economic development needs.

2.22 The guidance includes a methodology for undertaking land availability assessments which indicates what inputs and processes should lead to a robust assessment. The assessment should be thorough but proportionate, building where possible on existing information sources outlined within the guidance.

2.23 Each local authority area in the Dorset LEP area has established a land supply for employment development to meet its forecast needs through the Local Plan process. This Workspace Strategy will provide the evidence base that will underpin economic policy development in future Local Plan reviews and contribute towards ongoing work concerning an informal strategic planning approach for Dorset which is currently being progressed. The strategic work will identify and prioritise the supply and availability of land for employment development within the defined functional economic market areas (HMAs), set within a strategic context.

DORSET LOCAL ENTERPRISE PARTNERSHIP

2.24 The Dorset LEP is a voluntary partnership between local authorities, businesses and further & higher education institutions set up in 2011 to help determine local economic priorities and lead economic growth and job creation within the local area. The Dorset LEP undertakes some of the functions previously carried out by the South West Regional Development Agency which was abolished in March 2012.

2.25 The role of the LEP is to determine the priorities for investment in roads, buildings and facilities in Dorset in order to drive sustainable growth and create the right conditions for job creation.

2.26 The objectives of the Dorset LEP are to:

- improve the performance of existing businesses within Dorset, and to encourage the growth of new business start-ups, e.g. through inward investment;
- enhance the skills of the current and future workforce;
- improve electronic and physical connectivity, particularly through high speed broadband coverage; and
- create the conditions for enterprise, with an initial focus on establishing an agreed framework for spatial planning.

DORSET STRATEGIC ECONOMIC PLAN (SEP)

2.27 In March 2014, the LEP submitted its SEP, 'Transforming Dorset' to central government, the purpose of which was to identify and prioritise projects in Dorset that would deliver long term economic growth. The Plan, which proposed 51 investment projects, formed the basis for negotiations with Government for £600m of Growth Deal funding. The projects put forward in the bidding process estimated the creation of 26,000 new jobs, 3,000 new homes and the generation of £650m of public and private investment for the county between 2015 -2021.

2.28 The Dorset LEP was subsequently awarded £66.4 million from the Local Growth Fund in July 2014 and a further £12.6 million in January 2015 - a total of £79 million. The funding will aim to bring together local, national and private sector funding to unlock and unblock key housing and employment sites, create more highly skilled jobs and support economic growth.

2.29 The funding received to date has been allocated to a range of projects that include the provision of infrastructure around Bournemouth Airport (£39.5m) and the Port of Poole (23.3m), allocations towards preparatory work for the Jurassica project (£0.3m); the Orthopaedic Development and Innovation Accelerator Cluster - ODIAC (£0.7m); additional funding to continue the Dorset Growth Hub and provisional allocation for facilities at Bournemouth and Poole College. In addition, a new agri-tech centre has been built at Kingston Maurward College (£0.9M) and feasibility work has been undertaken to enable projects in the Dorchester/Weymouth corridor (£1.9M) including the facilitation of multi-modal transport opportunities.

DORSET LEP FUTURE STRATEGY

2.30 The LEP has revised the Vision and Strategic Objectives from the 2014 SEP. The LEP has also prepared further projects which will be submitted as bids for further rounds of Growth Deal funding. It is envisaged that a comprehensive refresh of the SEP will be undertaken when there is certainty regarding future governance structures in Bournemouth, Dorset and Poole following the current consideration of potential options for Unitary Authorities.

2.31 The SEP, together with this revised Workspace Strategy, will form key evidence base documents that will inform work currently ongoing on an informal strategic planning approach for Dorset, that will guide the development of new planning policies in future Local Plan documents, aimed at promoting economic growth in line with the NPPF.

Key Employment Sectors

2.32 Dorset is home to a mix of key sectors which include service and manufacturing businesses. Key amongst these are a regionally significant marine sector based around Dorset's three ports, a thriving financial business services industry, a flourishing food and drink sector, an advanced engineering sector with a particular focus in South East Dorset and one of the fastest growing creative and digital hubs in Europe, which is fast establishing itself as a world-class destination for digital and creative organisations.

2.33 Other key sectors identified by the LEP's Employment and Skills Board (ESB) are:

- Adult Social Care
- Tourism, Leisure, Hospitality, International Education
- Retail
- Environmental Goods and Services
- Construction

Western Dorset Growth Corridor

2.34 The Western Dorset Growth Corridor is set within the Dorset LEP area and focuses on developments in the corridor formed by Portland, Weymouth and Dorchester. The purpose of working on this Corridor is to enable sustainable, prosperous futures for the towns and achieve a better balance of investment and development.

2.35 The emerging strategy and action plan set out growth ambitions for the Corridor, which forms a significant part of the Tri-Councils (North Dorset, West Dorset and Weymouth & Portland Councils) and Dorset County Council's 'Priorities for Growth' and represents 413,000 residents and 21,000 businesses.

2.36 Implementation of this plan, and co-ordinating the necessary infrastructure to support this and other growth planned in the area, will require joint working between the local authorities and a range of other partners and stakeholders. It will be a co-ordinated approach to economic growth and a significant contributor to the objectives of the Dorset LEP SEP.

2.37 The Western Dorset Growth Corridor strategy will also be aligned to complementary activity through the Rural Dorset Growth Towns Initiative to achieve sustainable growth across the towns of rural Dorset and the coastal communities, such as Blandford, Bridport, Gillingham, Shaftesbury, Sherborne and Wareham. Each will have their own unique opportunities and challenges, including the need to stimulate and encourage the proactive development of employment sites, but which will also benefit from a co-ordinated and supportive strategic approach to economic growth.

Dorset County Council Enabling Economic Growth Strategy

2.38 Dorset County Council's vision is for a strong and successful Dorset economy, with strong businesses offering a diverse range of jobs to skilled and valued workers.

2.39 Given the crucial and strong links between economic prosperity and health and well-being, the Council understands that a vibrant economy and opportunities for all are essential prerequisites to achieving wider corporate objectives around health, well-being and safeguarding. The Council cannot create jobs but can help to create the conditions for enterprise and provide the economic (broadband, transportation, waste management, etc.) and social infrastructure (schools, skills, regeneration projects, environmental assets, etc.) to enable economic growth.

2.40 The Council is aligned to the four core priorities of the Dorset LEP, to make Dorset more competitive, connected, talented and responsive to make it easier to do business.

2.41 Early priorities for action in addition to 'business as usual' include:-

- Supporting key sectors of the Dorset economy
- Implementing the Digital infrastructure Strategy for Dorset County Council
- Ensuring effective mobile phone coverage is achieved
- Working with schools to improve knowledge of local employment opportunities and routes to employment
- Developing and delivering the Western Dorset Growth Corridor strategy
- Implementing the Care Act in ways which meet need and demand whilst realising economic growth opportunities

2.42 **Enterprise Zone – Dorset Green Technology Park**

2.43 A recent success for the LEP, in partnership with Purbeck District Council, Dorset County Council and the Homes and Communities Agency (HCA), has been the award of Enterprise Zone status for land at Dorset Green Technology Park, formerly known as the Winfrith Atomic Energy Authority Site. The acquisition of land at Dorset Green will result in investment in small workspace development as part of a larger ambitious programme to deliver workspace, innovation space and defence related research facilities. It is anticipated that Enterprise Zone Status will greatly assist in securing further growth deal funding and help with the marketing and sale of the site.

DISTRICT LEVEL POLICIES

2.44 The Workspace Strategy sets out recommendations regarding options for the distribution of employment land across the Dorset LEP area. The local policy frameworks and economic development strategies are material considerations in informing the future delivery of employment land. The key local plan policies regarding the safeguarding of employment land, district economic development strategies and their implications for economic development are set out below. Appendix B of the Workspace Strategy sets out a comprehensive schedule of employment related policies from each authority's adopted local plan.

BOURNEMOUTH BOROUGH COUNCIL

2.45 The Bournemouth Core Strategy was adopted in October 2012 with a plan period from 2006 – 2026. The 'Thriving Economy' chapter of the Core Strategy identifies an employment land requirement of 17ha for B1, B2 and B8 use classes to be delivered over the plan period to 2026 as informed by the 2008 Workspace Strategy. This requirement had been identified for Bournemouth as part of overall land requirements for the Bournemouth Travel to Work Area. As of November 2015 Bournemouth Borough have an employment land supply of 16ha.

2.46 The Core Strategy allocates a number of employment sites in addition to those carried forward from the previous District Wide Local Plan (2002). The largest additional site was Chaseside (11.8ha).

2.47 Bournemouth Borough Council's adopted Core Strategy sets out a clear policy approach for the protection of allocated and non-allocated employment sites for employment uses. There is some flexibility for alternative uses provided that this will not prejudice delivery of employment land requirements over the plan period. Policy CS26 applies to allocated employment sites and resists the loss of employment land to other uses and states that:

2.48 **Policy CS26 Protecting Allocated Employment Sites:**

2.49 ***Proposals for development in the allocated employment areas, as shown on the proposals map, that would result in the loss of sites or premises used, or last used, within Use Classes B1, B2 or B8 will not be permitted.***

2.50 ***New development on the allocated employment sites should provide a use within Use Classes B1, B2 or B8. Exceptionally, other employment development outside these Use Classes will be considered provided that they do not compromise the activities or integrity of the employment area and:***

- ***it can be demonstrated that there is no longer a need for the current employment use and the land and/or premises has been sufficiently and realistically marketed for Use Class B1, B2 and B8 uses for a period of at least 12 months;***
- ***the principal activity is not retail in nature;***
- ***there is a lack of suitable alternative sites, other than in existing employment areas for the type of employment activity proposed; and***
- ***the loss of the site to non-Use Class B1, B2 or B8 uses would not prejudice the long term employment requirements of the Borough.***

2.51 Policy CS27 sets out the approach for non-allocated employment sites and states:

2.52 **Policy CS27 Protecting Unallocated Employment Sites:**

2.53 ***Development resulting in the loss of sites or premises used, or last used, within Use Classes B1, B2 or B8 outside the allocated employment sites will not be permitted unless it can be demonstrated that either:***

- ***the current use causes environmental problems; or***
- ***the location of the premises is no longer suitable for employment use.***

2.54 ***Replacement uses will favour other employment generating uses prior to sites being considered for residential development. Prior to other non-employment uses being considered it must be demonstrated that an employment use is not forthcoming and the land and/or premises has been sufficiently and realistically marketed for a minimum of 12 months.***

2.55 The Lansdowne Employment Area is a key, sub-regionally important employment site particularly with regard to the development of offices. Policy CS8 seeks to ensure future employment led development in the area.

2.56 **Policy CS8 Lansdowne Employment Area:**

2.57 ***Within the boundary of the Lansdowne Employment Area development, including redevelopment or conversion, will be required to provide principally Use Class B1 (Business) space or tertiary teaching development. Other uses that form an element of a principally Use Class B1 (Business), or tertiary teaching, led mixed use scheme will also be acceptable, providing the function and integrity of the principal uses are not compromised, in the following order of preference:***

- ***other employment generating uses that can be demonstrated to generate significant employment opportunities;***

- ***small scale retail and other commercial uses only where such a use forms a ground floor only, incidental element, of a mixed use development;***
- ***residential or student accommodation only where it forms a subsidiary part of a principally Use Class B1 (Business) or tertiary teaching led scheme and it can be demonstrated that such a use is required to ensure the viability and deliverability of the mixed use scheme; and opportunities in other employment generating uses have been thoroughly investigated and marketed and can be shown not to be viable.***

2.58 Local Plan Review

2.59 The Core Strategy Inspector concluded that an early review of housing needs and potential provision was essential to make the plan sound. The forthcoming review of the Local Plan will be informed by the 2016 Workspace Strategy and 2015 Eastern Dorset Strategic Housing Market Assessment.

2.60 Town Centre Area Action Plan

2.61 The Council adopted a Town Centre Area Action Plan (AAP) on the 5th march 2013 which forms part of the Local Plan. In accordance with the Core Strategy the AAP sets out a strategy for economic growth in the town centre and identifies further allocations for employment and office development.

2.62 Bournemouth Economic Development Strategy

2.63 Following the Bournemouth, Dorset and Poole Economic Development Strategy 2005-2015, the Council approved a revised approach to Economic Development in March 2015 which covers the period 2015-2020 and this strategy is aligned with the Dorset LEP SEP. The Council is keen to support economic growth in the Borough and the wider sub region and is supportive of the Dorset LEP and SEP. The Council is committed to working jointly with neighbouring authorities in delivering economic growth and in working with the LEP to secure funding for infrastructure. Bournemouth's revised approach to economic development helps the Council achieve its corporate plan objective of A 'Thriving Economy' which states that Bournemouth Borough Council is committed to strengthening its key industries, and creating new opportunities for growth and development.

2.64 As an organisation Bournemouth Borough Council does this by:

- Building a smart and connected digital town
- Growing a vibrant digital and creative business sector
- Playing our part in a thriving conurbation
- Improving Bournemouth’s evening and night-time economy
- Investing in our tourism economy

2.65 The priorities of the revised Economic Development strategy are to:

- Focus on activities that contribute to jobs growth and jobs retention in Bournemouth
- Be an outward facing team that proactively engages with the private sector to generate opportunities (key account management)
- Have an emphasis on growth sectors & net-wealth creators
- Position Bournemouth as an attractive inward investment location
- Develop and promote a clear story & offer for Bournemouth as a great place to live and work
- Work with partners such as Dorset LEP to maximise opportunities that impact on Bournemouth's economy e.g. Bournemouth Airport and Poole Port
- Develop partnerships with Further and Higher Education organisations to create research opportunities that benefit business growth, working with the best local talent
- Further embed the importance of achieving positive economic growth across council activities
- Play our role in the development of a Combined Authority Model which brings together Council functions that support growth

2.66 The revised Economic Development Strategy focuses on the key principles of Business Growth, Physical Development and Business Sustainability, specifically in the following workstreams:

2.67 **Workstream 1: Business Growth**

2.68 **A: Position Bournemouth as a leading business location**

- Pro-actively develop key growth sectors: Creative / Digital, Financial Services, Tourism, Retail, Food, Environment
- Develop a structured robust key account management process with strategic employers (net wealth creators) to generate growth opportunities
- Develop clear offer in order to promote Bournemouth for inward investment around key sectors
- Generate and share growth leads with partners including universities, professional services firms & commercial property agents
- Influence greater alignment between skills development and the needs of Bournemouth's key growth sectors, developing research and innovation opportunities through further and higher education partnerships

2.69 **B: Support economic growth across Bournemouth**

- Proactively encourage enterprise and SME growth

- Invest in, support & promote services that encourage and support entrepreneurs
- Work with education providers and businesses to better retain and attract the best talent

2.70 **C: Ensure retail areas of Bournemouth continue to be thriving, enjoyable places**

- Proactively engage with retail community directly or with partners, to develop growth opportunities and to identify and solve challenges
- Develop and maintain dialogues with investors and major brands to position Bournemouth as a key investment location

2.71 **Workstream 2: Physical Development**

2.72 **A: Develop the physical environment for growth**

- Transformational project focus (e.g. Lansdowne/Town Centre Vision/Boscombe Regeneration) with partners such as Dorset LEP, neighbouring councils, FE/HE organisations
- Positive and collaborative relationship with the private sector, supporting developers in progressing major schemes
- Liaise with Planning colleagues to support the provision of quality A Grade office space
- Working with partners e.g. Bournemouth Chamber of Commerce, to address the issue of empty retail units
- Ensuring Bournemouth attracts and best utilises public sector funding sources for infrastructure projects
- Proactively engage with developer/commercial property industry to promote Bournemouth's story, to develop and share investment leads
- Promote the role of Natural Capital (the stock of natural assets) in developments, ensuring that environmental considerations enhance development and vice versa, increasing their resilience

2.73 **Workstream 3: Business Sustainability**

2.74 **A: Help Bournemouth become a Green Economy Leader**

- Create an influential business coalition to develop proposition, share best practice and encourage action
- Bring together into one proposition, existing disparate but positive activities that drive economic productivity through reducing carbon and/or using natural resources more efficiently
- Work with Council departments to create a culture and a set of policies that embraces sustainability and the concept of Natural Capital
- Promote Bournemouth as a Green Economy Leader nationally & internationally to attract investment & talent, drive innovation and increase productivity

BOROUGH OF POOLE

2.75 The Poole Core Strategy (adopted in February 2009) covers a plan period from 2009 – 2026. The Core Strategy identifies a requirement for 39.5ha of employment land to be delivered over the plan period to 2026. This requirement was informed by the 2008 Workspace Strategy and relates to demand identified for the Poole Travel to Work Area (TTWA).

2.76 The adopted Core Strategy identified employment land supply within the Borough of approximately 39ha in 2009, which provided a good match to the Local Plan requirement. However, in his binding report on the Examination in Public of the Core Strategy, the Inspector set out his considerations in respect to employment matters which included his deliberations on Poole's identification of a supply of employment land to meet projected need for B1, B2 or B8 uses. It was the Inspector's opinion that the Council might struggle to deliver the overall amount of employment land required over the Plan period. His concerns over a potential shortfall in employment land provision led the Inspector to advise that land at North Poole be retained as safeguarded land for possible future employment use. He considered that this would provide a reasonable fall-back position should the quantity of employment land required to meet Poole's identified needs fail to be met.

2.77 Following a Public Inquiry into the refusal of planning permission for the development of land at North Poole for 42,000 sqm of employment floorspace in June 2013, the Inspector granted planning permission for employment development totalling 16,000 sqm. The current on-going review of the Core Strategy will consider the future allocation of the remaining land at North Poole for employment uses.

2.78 More recently, Poole has been working closely with neighbouring authorities in accordance with the Duty to Co-operate, to secure the delivery of employment land that will meet the sub region's projected needs. Through the Core Strategy review process, Poole has identified potential for approximately 66ha of employment land. A further 30ha of land, the majority of which currently lies within the Green Belt, is being promoted by a consortium. Further consideration of this land will be undertaken as the review progresses and set within the context of the overall need for employment land across South East Dorset (see below).

2.79 There are a number of key employment sites in the Borough which contribute towards the delivery of the Core Strategy land requirement including the following:

- The Regeneration Area – (36,000sqm / 9ha)
- Port of Poole – 2,100 jobs (4.5ha)
- Fleets Corner – 1,300 jobs (6.5ha)
- Sopers Lane – 1,000 jobs (4.5ha and with overall potential of 11ha)
- Existing Employment Areas & Allocations – 18.74ha available land.

2.80 The Borough of Poole Site Specific Allocations DPD was adopted in April 2012 and contains further employment allocations.

- Fleets Corner and Sopers Lane (More detailed allocation consistent with Core Strategy, 11ha)
- Land at Sterte Avenue West, Sterte – (5.13ha, Employment uses, B1, B2 & B8)
- Land at Sembcorp Bournemouth Water (Mixed use scheme including employment, 1.46ha)
- Crown Closures Ltd, Lake Road (Mixed use scheme including employment, 2.92ha)

2.81 Within the Borough as a whole there are 20 existing industrial estates with over 293ha of land, the largest of which are Mannings Heath, Nuffield and Fleets Lane. These larger sites are of strategic importance in terms of function and employment land provision within South East Dorset. Existing employment sites provide a resource that is used and re-used in addressing sub regional job growth requirements.

2.82 The Borough of Poole Core Strategy sets out the policy framework for the protection of employment land within existing employment areas and ensures that proposals are consistent with the policy objectives of the Local Plan. A more flexible approach, subject to a sequential approach, is adopted for alternative uses on isolated employment sites. Policy PCS2 is set out below:

2.83 **PCS 2 - Existing Employment Areas:**

2.84 ***Land and premises within Poole's existing employment areas will be reserved for uses which generate employment, and which are appropriate to the location as a consequence of:***

i. ***the principal activity falling within Use Classes B1, B2 or B8;***

ii. ***their need to be in the employment area in question, due to close associations with neighbouring businesses;***

iii. ***their potential to have an adverse impact in more sensitive locations such as residential areas; or***

iv. ***a lack of suitable alternative sites, other than in existing employment areas, for the type of employment activity proposed.***

2.85 ***In all cases proposals will only be permitted where they do not compromise the activities of the employment area or conflict with other policy objectives in the Local Development Framework.***

2.86 The Core Strategy sets out the following policy approach for the consideration of proposals for non-employment uses on isolated employment sites located outside the core existing employment areas.

2.87 **<u>PCS 4 - Isolated Employment Sites:</u>**

2.88 ***For sites currently or previously used for activities falling within Use Classes B1, B2 or B8 of the Use Classes Order 1987 (as amended) which are located outside of existing employment areas, alternative uses to B1, B2 or B8 will only be considered if the site is no longer suitable or viable for continued employment use and the cost of refurbishment or redevelopment for a more appropriate form of employment use would be prohibitive. Where these exceptional circumstances apply, the Local Planning Authority will first seek to secure the provision of small starter business units as part of a comprehensive mixed use scheme before it considers single-use developments. Priority will then be given to alternative uses in the following sequence:***

i. ***health or care-related uses, including care homes and specialist health facilities, where the site is suitably accessible for the use proposed;***

ii. ***other uses which generate employment; and***

iii. ***residential development, where the site offers an acceptable environment.***

2.89 **Core Strategy Review**

2.90 The Council is currently reviewing the adopted Core Strategy and undertook consultation on Issues and Options in February / March 2015.

2.91 A further Issues and Options consultation was undertaken between June / August 2016, and a pre-submission consultation is anticipated to take place in the summer of 2017, which will set out revised requirements and allocations for housing and employment land informed by the 2015 Strategic Housing Market Assessment and 2016 Workspace Strategy.

2.92 The Issues and Options stage of the Core Strategy Review identified two new greenfield options for the provision of employment land which include sites A and B below. Sites C and D are allocations in the adopted Core Strategy that are now being revisited.

A. Land south of Magna Road – (Potential being explored for employment development. A Consortium of landowners are promoting potential for a further 50,000m2 of employment floorspace, over and above the existing Magna Business Park site.)

B. Joint Universities Business Park, Talbot Village – (Potential mixed use allocation that is likely to include education, residential, open space and employment related to the digital and creative industries.)

C. Land at Sopers Lane - Site allocated in the Core Strategy for employment development, but now being considered for development of up to 200 homes and some small scale employment development.

D. Pilkington Tiles & Sydenham Timber Yard – Site allocatedwas allocated in the Core Strategy for mixed use including office but is now being considered for residential, retail and leisure uses.

2.93 The Borough of Poole Economic Development Strategy

2.94 The Borough of Poole published an Economic Development Strategy and Action Plan (September 2014), covering the 5 year period 2014-2019. This strategy is aligned with the Dorset LEP SEP, 'Transforming Dorset', which has identified funding of £23.3M for infrastructure improvements in relation to the Port of Poole.

2.95 The strategy sets out the way forward for stimulating business, enterprise and innovation, supporting employment, education and skills; and facilitating the delivery of infrastructure and housing. The strategy sets out the following strategic objectives:

2.96 **Strategic Economic Objective 1: Stimulating business, enterprise and innovation:**

- Priority 1: Support local businesses to develop and grow
- Priority 2: Develop key sectors (Advanced Engineering and Manufacturing; Creative Digital Industries; Health and Social Care; Financial/Insurance and Environmental Goods/Services)
- Priority 3: Increase exports
- Priority 4: Attract inward investment
- Priority 5: Increase innovation and joint working between businesses and universities and colleges

2.97 **Strategic Economic Objective 2: Supporting employment, education and skills:**

- Priority 1: Deliver business-led skills provision
- Priority 2: Increase qualifications (incl Eng and Maths), higher skills levels (Level 4), STEM skills, entrepreneurialism skills and wages
- Priority 3: Increase the diversity of career options (apprenticeships, traineeships etc.)
- Priority 4: Increase skills/employment for disadvantaged residents and communities
- Priority 5: Increase careers advice and employability skills

2.98 **Strategic Economic Objective 3: Facilitating the delivering infrastructure, transport, housing and key sites:**

- Priority 1: Improve connectivity by road, rail and broadband
- Priority 2: Deliver more housing and affordable housing

- Priority 3: Allocate and safeguard employment generating sites
- Priority 4: Protect and enhance retail centres

2.99 The strategy notes that as a result of the economic downturn combined with owner aspirations for some allocated sites there has been a low take up of employment land in Poole in recent years. Additionally the supply of office accommodation in Poole Town Centre has reduced as a result of government changes to permitted development rights allowing the conversion of offices to residential through the prior approval process.

2.100 The strategy references measures to improve connectivity and highways capacity through junction improvements in Local Transport Plan 3. Some of these schemes have received funding through the Local Enterprise Partnership's Strategic Economic Plan which includes infrastructure projects around the Port of Poole and Poole Regeneration Area.

2.101 The strategy identifies the regeneration area within the town centre to attract new investment and create new residential, office, and some retail based employment. The Regeneration Area comprises four main sites including the former Hamworthy power station site, land between Wilkins Way / Twin Sails, land between Poole Bridge and Wilkins Way and Pilkington Tiles.

CHRISTCHURCH AND EAST DORSET COUNCILS

2.102 The Christchurch and East Dorset Core Strategy was adopted in April 2014 with a plan period of 15 years from 2013 – 2028. The Workspace Strategy covers the period to 2033 so for the purposes of the employment land projections assumptions have been made regarding housing growth beyond 2028 in line with the Eastern Dorset SHMA (2015).

2.103 **Policy KS5** of the adopted Core Strategy sets out the level of employment land to be delivered across Christchurch and East Dorset over the plan period to 2028. This identifies a requirement to deliver 80ha of employment land for B1, B2 and B8 use classes over the plan period to 2028. This requirement has been informed by the employment land projections contained in the 2012 Workspace Study with 10% flexibility.

2.104 The employment allocations are evenly distributed across Christchurch and East Dorset District. In East Dorset the major allocated sites include Blunts Farm (30ha, Ferndown), Woolsbridge (13 Ha, 3 Legged Cross) and Bailie Gate, (3.3Ha, Sturminster Marshall). In Christchurch Bournemouth Airport Business Park is the strategic allocation with a remaining development potential of approximately 60ha. For the airport 30ha at the airport is identified to come forward over the plan period to 2028. However, the councils have been working with the Dorset LEP to secure improvements to the B3073 and A338 that will enable an increased delivery trajectory and the potential to deliver approximately 60ha over the current plan period. There are a number of smaller sites in the Christchurch urban area that make up the remainder of employment land supply in the Borough and these collectively total approximately 10ha.

2.105 **Policy BA1** of the Core Strategy sets out the vision for the operational airport and the business parks and Policy BA2 sets out the strategic allocation and strategy for these sites. The Airport business park is allocated for B1, B2 and B8 use classes with some ancillary non B uses. The site has an approximate remaining development potential of 60ha with 30ha identified to come forward over the plan period to 2028.

2.106 **Policy FWP8** of the Core Strategy allocates 30ha of land at Blunts Farm (adjacent to Ferndown Industrial Estate) for B1, B2 and B8 use classes with some ancillary non B use class development.

2.107 **Policy VTSW6** of the Core Strategy allocates 13ha of land adjacent to the existing Woolsbridge Industrial Estate for employment development within B1, B2 and B8 use classes.

2.108 **Policy RA1** of the Core Strategy allocates 3.3ha of land at Bailie Gate Sturminster Marshall for employment development within B1, B2 and B8 use classes.

2.109 **Policy PC1** of the Christchurch and East Dorset Core Strategy sets out an employment land hierarchy that has been prepared in order to influence the location of employment uses across sites in the plan area. The policy identifies ‘Strategic High Quality’ and ‘High Quality’ sites and these sites are the focus for meeting projected requirements for B1, B2 and B8 use classes. Other sites identified in the hierarchy which are also required to meet projected requirements for B1, B2 and B8 uses but where a more flexible approach has been adopted to also accommodate other non-employment uses which are ancillary to the core employment function.

2.110 **Policy PC2** of the Christchurch and East Dorset Local Plan presents a strong policy framework for the protection of existing employment sites across the plan area. The policy is set out below:

2.111 **<u>Policy PC2: Alternative Uses for Employment Land Where Justified by Market Evidence:</u>**

2.112 ***Where there is strong evidence of the lack of market demand over the plan period (2013 – 2028) employment land may be considered for non B use classes. High quality mixed use schemes may also be considered to ensure a site can be brought forward for development.***

2.113 **Policy PC4** of the adopted Christchurch and East Dorset Core Strategy sets out the approach to economic development in the rural area. The policy states that economic development will be strictly controlled away from existing settlements. Economic development will be encouraged where development is located in or on the edge of existing settlements where employment, housing, services and other facilities can be provided close together.

2.114 The policy also sets out criteria for the conversion and re-use of appropriately located and suitably constructed existing buildings in the countryside for economic development, including tourist related uses. Further criteria are set out for the rural diversification and agricultural development.

2.115 **Local Plan Review**

2.116 Christchurch and East Dorset Councils are currently preparing a review a comprehensive review of the Local Plan and a revised Local Development Scheme has been published setting out the forward timetable. A Regulation 18 scoping consultation is scheduled for autumn 2016, Issues and Options consultation in September / October 2017, Pre Submission consultation in September / October 2018, Submission in January 2019 and anticipated adoption by December 2019. It is currently anticipated that the revised Local Plan will be informed by the OAN housing figures in the 2015 Eastern Dorset SHMA.

Christchurch and East Dorset Economic Development Strategy

2.117 Christchurch and East Dorset Councils have produced a joint economic development strategy which was published in July 2015 which is aligned to the Dorset LEP Strategic Economic Plan.

2.118 The strategy focuses on the following key themes:

- Infrastructure
- Site and Premises
- Business Support and Skills
- Growing Communities
- Housing

2.119 The plan strategy will measure performance through growth in GVA output, total increase in employment within key sectors including advanced engineering, aerospace and defence and creative industries and increase in skills and qualifications.

2.120 **Infrastructure**

2.121 The Economic Strategy supports the Airport Growth Programme which identifies strategic highways improvements along the A338 and B3073 corridor which have been identified in the Local Plan and delivered through Growth Deal funding secured through the LEP.

2.122 The Strategy also refers to the need to maintain identified improvements to the A31 on the LEP agenda and to lobby government to secure their delivery.

2.123 The delivery of high speed broadband infrastructure is also identified as a priority across the LEP area to meet the needs of businesses and facilitate economic growth.

2.124 **Sites and Premises**

2.125 The council will work closely with landowners to help facilitate the delivery of employment sites allocated in the Local Plan and delivered through the planning process.

2.126 Where appropriate the council is also seeking to prepare Local Development Orders for strategic employment sites which will simplify the planning process and help to attract inward investment.

2.127 **Business Support and Skills**

2.128 The strategy contains a number of actions including the launch of a Local Planning Charter which has been devised and delivered by the councils' Development Management service.

2.129 The council has also committed to work closely with the Dorset LEP to provide support key commercial and industrial sectors in the local area.

2.130 **Growing Communities**

2.131 This theme prioritises the development of town centre strategies for Christchurch and Ferndown and Business Improvement Districts in Wimborne and Ferndown and Uddens Industrial Estate and Christchurch.

2.132 The Councils will also play an active role in securing funding for developing the rural economy in East Dorset through the LEADER programme.

2.133 **Housing**

2.134 The strategy sets the priority to work pro-actively with developers and landowners to ensure the development of housing sites that are allocated in the Local Plan, which will also be delivered by the council's planning service. The Councils will also work with the Dorset LEP to deliver strategic housing schemes and work with other councils to plan strategically to deliver future sub regional housing requirements.

NORTH DORSET DISTRICT COUNCIL

2.135 The North Dorset Local Plan Part 1 was adopted in January 2016 and covers a plan period from 2011 – 2031. Following adoption of the plan an early review will commence to take account of changing circumstances and new evidence including the 2015 Eastern Dorset SHMA and the 2016 Workspace Strategy.

2.136 The Local Plan sets out an employment land requirement that has been informed by the 2008 Workspace Strategy and 2012 Workspace Study. The Plan identifies a need to provide 30.5ha of employment land over the plan period to 2031 which is balanced against employment land supply of approximately 50ha. As of November 2015, it is considered that approximately 40ha of employment land is available to the market. The level and distribution of employment land supply in the district is sufficient to meet the requirement identified in the Local Plan.

2.137 Each of the four main towns in the district has a strategic employment site and collectively they provide 33ha of land including the following:

- Part of the Brewery site, Blandford St. Mary (3.0 hectares)
- Land off Shaftesbury Lane, Blandford Forum (4.8 hectares)
- Brickfields Business Park, Gillingham (11.7 hectares)
- Land south of the A30 at Shaftesbury (7.0 hectares)
- North Dorset Business Park, Sturminster Newton (6.3 hectares)

2.138 The Council has also identified a number of sites for mixed use development near town centres which will enable economic growth for office and non – B use class employment.

2.139 The Council has adopted a more flexible approach to the range of uses permitted on employment sites which allows employment related development of non-B-use classes in addition to B1, B2 and B8 uses. This approach has been possible as the Local Plan identifies an employment land supply in excess of projected demand.

2.140 **Policy 11:** The Economy sets out the policy framework for the economy including the employment land requirement for the plan area and identification of key strategic sites that will be developed primarily for B1, B2 and B8 employment uses and sites adjacent town centres for mixed use regeneration. This policy also sets out uses that will be permitted on established and allocated employment sites in the district. The element of the policy relating to the safeguarding of employment land is summarised below:

2.141 **Policy 11 The Economy**

2.142 ***Uses on Employment Sites***

2.143 ***..Existing employment sites and sites identified for future employment uses will be protected from other forms of development. On such sites, the Council will permit employment (B-Class) uses and, where it would support businesses and / or provide a wider range of jobs, may also permit:***

O. ***community uses, such as community halls; and***

P. ***healthcare facilities, such as doctors and vets surgeries (but not any healthcare facility with a residential element, such as a care home); and***

Q. ***education facilities, including training facilities for businesses and preschool nurseries; and***

R. ***Small scale retail, which is ancillary to a B Class use……***

2.144 North Dorset Economic Development Strategy

2.145 The current economic development strategy covers the period 2012 – 2015. The overall aim of the strategy is to stimulate the economy, create economic growth and jobs and attract resources and investment to the area. The strategy sets out the following strategic priorities which includes the delivery of sufficient employment land to meet the needs of business over the Local Plan period.

- To provide support to the Dorset Local Enterprise Partnership as part of the Strategic Economic Development Team in making Dorset the natural place to do business.
- To achieve superfast broadband coverage for the district
- Top achieve an appropriately skilled labour market by improving the appropriateness and quality of skills in the workforce
- To encourage the development of employment sites throughout the district, to create economic growth, safeguard jobs and increase the economic activity of the area.
    - Ensuring an adequate supply of employment is included in the Core Strategy
    - Provide adequate infrastructure and connectivity
    - Attracting private sector investment
- To enhance the role of market towns as the vibrant economic hubs offering a wide range of goods and services.
- To retain employment and access to goods and services in rural areas.
- To attract as much resource to the area as possible
- To place North Dorset as a high quality profile and desirable place to do business and to improve physical and ICT communications in the area and promote benefits to businesses.

PURBECK DISTRICT COUNCIL

2.146 Purbeck's Local Plan Part 1 was adopted in November 2012 and covers the plan period 2006 – 2027.

2.147 The 2012 Workspace Study has informed the Local Plan employment land requirement and Purbeck have judged demand based on the Poole Travel to Work Area. Core Strategy Policy ELS identifies a requirement to provide 11.5 ha of employment land over the plan period to 2027 for B1, B2 and B8 use classes. At the time of the Core Strategy adoption an employment land supply of approximately 35ha was identified which is sufficient to address identified demand. This has increased to approximately 44ha of supply with the Local Plan review identifying approximately an additional 27ha over and above that which is already available. The main sites of strategic significance within the District are Holton Heath Trading Park (5ha currently available) and Dorset Green Technology Park (approximately 30ha currently available).

2.148 **Policy E** of the adopted Core Strategy sets out the policy approach for the provision and location of new employment development and the safeguarding of existing employment sites. The policy also includes flexibility for the consideration of non B use class development which generates employment subject to criteria as set out. The elements of the policy relating to the safeguarding of employment land are set out below:

2.149 **Policy E: Employment: …Safeguarding Employment Land**:

2.150 ***Existing employment land, as set out in Table 2 in Section 6.5, will be safeguarded for B1, B2 or B8 uses. New proposals will only be permitted where they do not compromise the integrity of the employment site. The expansion of the existing employment use(s) will be permitted where this would not result in an unacceptable adverse impact in terms of visual harm, noise and traffic flow.***

2.151 ***Redevelopment or change of use of employment land***

2.152 ***Exceptionally, other uses that generate employment may be considered on safeguarded employment land where they are appropriate to the location providing that:***

- ***The use is not primarily retail in nature;***
- ***There is a need for the business to be located within the employment land on account of close connection with neighbouring businesses;***
- ***There is a potential for an adverse impact if located within another more sensitive location, such as residential areas;***
- ***There is a lack of suitable alternative sites, other than in existing employment land for the type of employment activity proposed; and***
- ***It can be demonstrated that there is no longer a need for the employment use and the current use has been sufficiently and realistically marketed for a period of at least 9 months to show that the current use is no longer viable.***

2.153 **Purbeck Economic Development Strategy**

2.154 The Purbeck Economic Development Strategy covers the period 2013 – 2027 which aligns with the adopted Local Plan and has also been prepared to inform the current Local Plan review. The aim of the strategy is to improve the local economy and infrastructure within the district while protecting Purbeck's unique environment. The Council sets out its commitment to working closely with neighbouring authorities and the Dorset Local Enterprise Partnership in delivering economic growth priorities.

2.155 The strategy identifies the following key sectors in the district which are growing in the local area:

- Marine
- Defence / Security
- Advanced Engineering
- Mining & Quarrying
- Environmental
- IT
- Tourism
- Agriculture and Local Food

2.156 The economic strategy is aligned with the Corporate Plan and sets out the following strategic priorities:

- Support the provision of high speed broadband across the District
- Support the development of knowledge based businesses in the District
- Support effective mentoring schemes for new businesses
- Support the development of additional work space in the District
- Implement the Purbeck Transport Strategy to improve the road and rail network

2.157 The strategy provides a commitment to facilitate the delivery of employment land through the planning process to ensure an appropriate distribution of land to meet need identified through the Local Plan.

WEST DORSET / WEYMOUTH AND PORTLAND COUNCILS

2.158 The West Dorset and Weymouth and Portland Local Plan was adopted in October 2015 and covers a plan period from 2011 – 2031.

2.159 The Local Plan has identified a projected growth in employment of 13,000 additional jobs that will be created by the end of the plan period in 2031. This figure has been calculated alongside the objectively assessed needs for housing identified in the Western Dorset SHMA 2014. In order to accommodate this job growth the Local Plan identifies a requirement to provide 60ha of employment land over the plan period. This land requirement translates into a need to provide 43.6ha in West Dorset and 16.7ha in Weymouth and Portland. The amount of employment land allocated in the Local Plan exceeds this assessed requirement and provides flexibility for likely vacancies / churn and a degree of market choice.

2.160 The Local Plan identifies an employment land supply of 57.5ha in West Dorset and 28ha in Weymouth and Portland which exceeds the land requirement identified in Policy SUS1. Local Plan Policy SUS1 'The Level of Economic and Housing Growth' sets out the housing target and the distribution of employment land between West Dorset and Weymouth and Portland as set out above. As of November 2015 the Council has identified a land supply of approximately 64ha that is considered currently available to the market.

2.161 Larger sites of a strategic nature allocated in the Local Plan include the following:

- Weymouth – Littlemoor Urban Extension 12ha
- Portland – Osprey Quay – 8.6ha
- Dorchester – Poundbury Urban Extension 6ha
- Crossways – Land at Crossways 3.5ha
- Bridport – Vearse Farm 4ha
- Sherborne – Barton Farm 3.5ha

2.162 Policy ECON1 of the adopted Local Plan sets out the approach towards the location of new employment development primarily focusing new development within or on the edge of settlements but will some flexibility for economic development in rural areas.

2.163 The Local Plan sets out a number of key employment sites located across the plan area which will be protected for B1, B2 and B8 use classes. The policy approach for the protection of these sites and the consideration of other uses is set out below in Policy ECON2.

2.164 **ECON2. Protection of Key Employment Sites:**

i. ***Within key employment sites (as identified on the policies map) applications for B1 (light industrial), B2 (general industrial), B8 (storage and distribution) and other similar uses will be permitted subject to proposals not having a significant adverse impact on surrounding land uses.***

ii. ***The use of key employment sites for employment purposes other than B1, B2 and B8 may be appropriate if it can be proven that the use provides on-site support facilities or demonstrates an economic enhancement over and above B1/ B2 / B8 uses. Such development will not prejudice the efficient and effective use of the remainder of the employment area.***

iii. ***Retail uses will not generally be supported. Exceptionally, uses which have trade links with employment uses or are un-neighbourly in character (such as car showrooms, tyre and exhaust***

centres, or trade counters) may be permitted on employment sites which have good access to a range of transport options.

iv. ***Other uses that do not provide direct, on-going local employment opportunities will not be permitted.***

2.165 **Policy ECON3** of the Local Plan sets out a more flexible approach to a broader range of economic development for other employment sites (non-key sites). This policy enables opportunities for mixed use development while also supporting economic growth and the generation of new jobs. The policy also sets out the framework for the consideration of non-employment uses where there no reasonable prospect of the site being used for employment purposes.

2.166 **ECON3. Protection of Other Employment Sites:**

i. ***Outside key employment sites, the redevelopment of existing employment sites to an alternative employment use will normally be permitted.***

ii. ***The redevelopment of employment land and premises for non-employment uses that are in accordance with other planning policies will be permitted where it will not prejudice the efficient and effective use of the remainder of the employment area and:***

- ***the present (or where vacant or derelict, the previous) use causes significant harm to the character or amenities of the surrounding area and it has been demonstrated that no other appropriate viable alternative employment uses could be attracted to the site; or***
- ***a substantial over-supply of suitable alternative employment sites is locally available; or***
- ***redevelopment of the site would offer important community benefits or no significant loss of jobs / potential jobs.***

2.167 **West Dorset & Weymouth and Portland Economic Development Strategy**

2.168 West Dorset and Weymouth and Portland Councils have prepared a joint economic development strategy for the period 2014 – 2020. The strategy prioritises the growth of key employment sectors and is aligned to the strategic priorities of the Dorset Local Enterprise Partnership Strategic Economic Plan. The strategy also sets out priorities for the delivery of key employment sites and the delivery of strategic transport infrastructure to support economic growth. The priorities of the strategy are as follows:

- Delivery of Superfast Dorset project including the Superfast Business Support Programme for businesses particularly in West Dorset
- Continue to improve the business support offer aimed at increasing business survival rates, business start-ups and self-employment, accessible in rural areas

- Work with key sectors including manufacturing, engineering, renewable industries, marine and tourism to develop the Dorset Local Enterprise Partnership's growth strategy
- Bring forward development of key employment sites including Littlemoor (Weymouth and West Dorset), Barton Farm (Sherborne) and Vearse Farm (Bridport)
- Include key sites (including Weymouth Gateway and Poundbury) in marketing campaigns to increase inward investment
- Support joint ventures to bring forward the delivery of new and affordable housing on sites with planning permission
- Develop a long term plan to promote Portland as a centre of excellence for marine and advanced engineering
- Prioritise transport infrastructure growth to support improved North-South transport links including Yeovil and Bristol, a faster trains service to Bristol and London and improved transport links to Osprey Quay and Portland Port
- Develop and promote the coast and countryside offer to increase Dorset's share of the visitor market

SUMMARY

2.169 The Government places strong emphasis on economic prosperity and local plan led growth. However, there is also strong competition for development land, particularly from housing which also benefits from support through government policy.

2.170 The NPPF is clear that economic growth will be supported through the planning system. Through the preparation of Local Plans it is necessary to ensure that sufficient land of the right type is provided in the right location with necessary supporting infrastructure. Economic growth should be delivered through the provision of new homes, business and industrial units and infrastructure.

2.171 The NPPG provides further guidance for the assessment of housing and economic development needs and the availability of land for housing and economic development at the local level. The determination of employment land and housing requirements and the distribution of land should be established working closely with neighbouring authorities in the relevant housing market area / functional economic area.

2.172 The local authorities of Bournemouth, Dorset and Poole have worked together to produce SHMAs for the Eastern and Western Dorset HMAs (2014, 2015). This Workspace Strategy is aligned with these SHMAs and establishes employment land projections for the Dorset LEP area and the Eastern and Western Dorset HMAs, taking into account impact of the objectively assessed needs (OAN) for housing in each HMA.

2.173 Each of the Dorset authorities has established a land supply for employment development to meet future requirements identified through the Local Plans. This Workspace Strategy will provide the evidence base that will underpin economic policy in future local plan reviews and the informal strategic planning undertaken between Dorset authorities. The informal strategic planning work and Duty to Co-operate discussions between Dorset authorities will inform the growth scenario to be adopted in the Dorset LEP area which will inform the future distribution of employment land within the Eastern and Western Dorset HMAs.

2.174 The Dorset LEP prioritises investment in strategic infrastructure in order to drive economic growth. Through the preparation of the SEP the LEP has secured Growth Deal funding for the delivery of infrastructure to support long term economic growth. This is enabling the delivery of highways infrastructure to support the growth of Bournemouth Airport and adjoining business park and the Port of Poole.

2.175 At a district level the local plans of the Bournemouth, Dorset and Poole authorities set out policies for the level of provision, distribution and protection of employment land. These local plans have been adopted at different times and take differing approaches to growth scenarios and the provision of employment land. It is the purpose of the Workspace Strategy review to provide a shared evidence base and strategy options to inform a consistent approach for the provision of employment land for the Dorset LEP area. This will be established through the informal strategic planning process between authorities and Local Plan reviews.

2.176 Overall through their local plans the authorities of Bournemouth, Dorset and Poole have strong policy frameworks for the protection of employment land for B1, B2 and B8 use classes. However, there is some variation in the degree of flexibility allowed for the consideration of alternative uses.

2.177 Bournemouth Borough Council's Core Strategy sets out a clear policy approach for the protection of allocated and non-allocated employment sites for employment uses. There is some flexibility for alternative uses provided that this will not prejudice delivery of employment land requirements over the plan period.

2.178 The Borough of Poole sets out a policy framework for the protection of employment land within existing employment areas and ensures that proposals are consistent with the policy objectives of the Local Plan. A more flexible approach is adopted, subject to a sequential approach, for alternative uses on isolated employment sites.

2.179 Christchurch and East Dorset Councils Local Plan provides a policy framework for the protection of allocated and non-allocated employment sites. Alternative uses will only be considered when they will not compromise the ability to meet demand over the plan period. The Local Plan also sets out an employment land hierarchy to influence the location and type of employment development across the plan area. This classifies high quality sites which will be the focus for the delivery of projected requirements for employment land and other sites where a more flexible approach is adopted for alternative uses.

2.180 North Dorset District Council's Local Plan sets out an overarching policy for economic development. This policy framework protects employment sites but provides the flexibility for alternative uses where they would support business and provide a wider range of jobs.

2.181 Purbeck District Council's Local Plan protects existing employment land for B1, B2 and B8 uses but provides flexibility for other employment generating uses in exceptional circumstances.

2.182 West Dorset and Weymouth & Portland Councils' Local Plan protects key employment sites identified in the plan for B1, B2 and B8 use classes and provides flexibility for non B use class employment generating development. A more flexible approach is adopted for other (non-key sites) employment sites in the plan area which enables mixed use development whilst supporting economic growth.

2.183 The local authorities of Bournemouth, Dorset and Poole have prepared economic development strategies that are mainly aligned with the strategic priorities of the Dorset LEP SEP. These strategies are also aligned with the respective Local Plans for each authority and prioritise the delivery of key employment sites and associated infrastructure to meet the needs of the local economy and inward investment. They also prioritise the need to lever in funding to secure key infrastructure that will bring forward sites for economic development. In this respect the Dorset LEP performs an important strategic function in securing funding sources such as Growth Deal funding.

3 Commercial Property Market Review

3.1 This chapter of the Workspace Strategy provides a commercial property market analysis for the Dorset LEP area including the Eastern and Western Dorset HMAs.

3.2 The assessment of the property market firstly sets the study area in the context of the international and national property and investment markets through examining current needs, requirements and trends at a national level and international level.

3.3 Secondly, the market assessment looks at the local level and examines current and future performance of the office and industrial markets for the Eastern and Western Dorset HMAs (as functional economic areas). This analysis includes a comparison in the performance of the Eastern and Western Dorset HMAs.

3.4 In undertaking this commercial property market analysis it is necessary to define the natural commercial property market areas within the Dorset LEP area at a more fine grained geographical level. These areas constitute natural property market areas that form linkages between settlements, land use types and highways infrastructure. Through analysis of these local commercial property market areas it has also been possible to identify geographical centres for office and industrial development within the study area in consultation with local authorities and commercial property agents operating in Eastern and Western Dorset. This assessment also identifies commercial market linkages to areas outside the Dorset LEP area.

3.5 An understanding of the natural commercial property market areas and location of centres for office and industrial markets is fundamental to inform the strategic planning process and the future distribution of employment land. The Workspace Strategy provides employment land projections at an HMA level according to a range of growth scenarios as set out in Chapter 5. Options for the future provision and distribution of employment land in this Workspace Strategy have been informed by market requirements for office and industrial development at a property market level. The delineation of these commercial property market areas and centres for office and industrial markets within the Dorset LEP area are set out below.

3.6 This commercial property market review also examines the following factors in relation to Eastern and Western Dorset HMAs and their sub market areas:

- Factors influencing commercial investment decisions
- Current and future demand for employment land, office and industrial premises from existing business and inward investment
- The supply of employment land, office and industrial accommodation and suitability to meet current and future business needs

- Performance of the Dorset market areas in relation to neighbouring areas
- Barriers to key employment sites coming forward

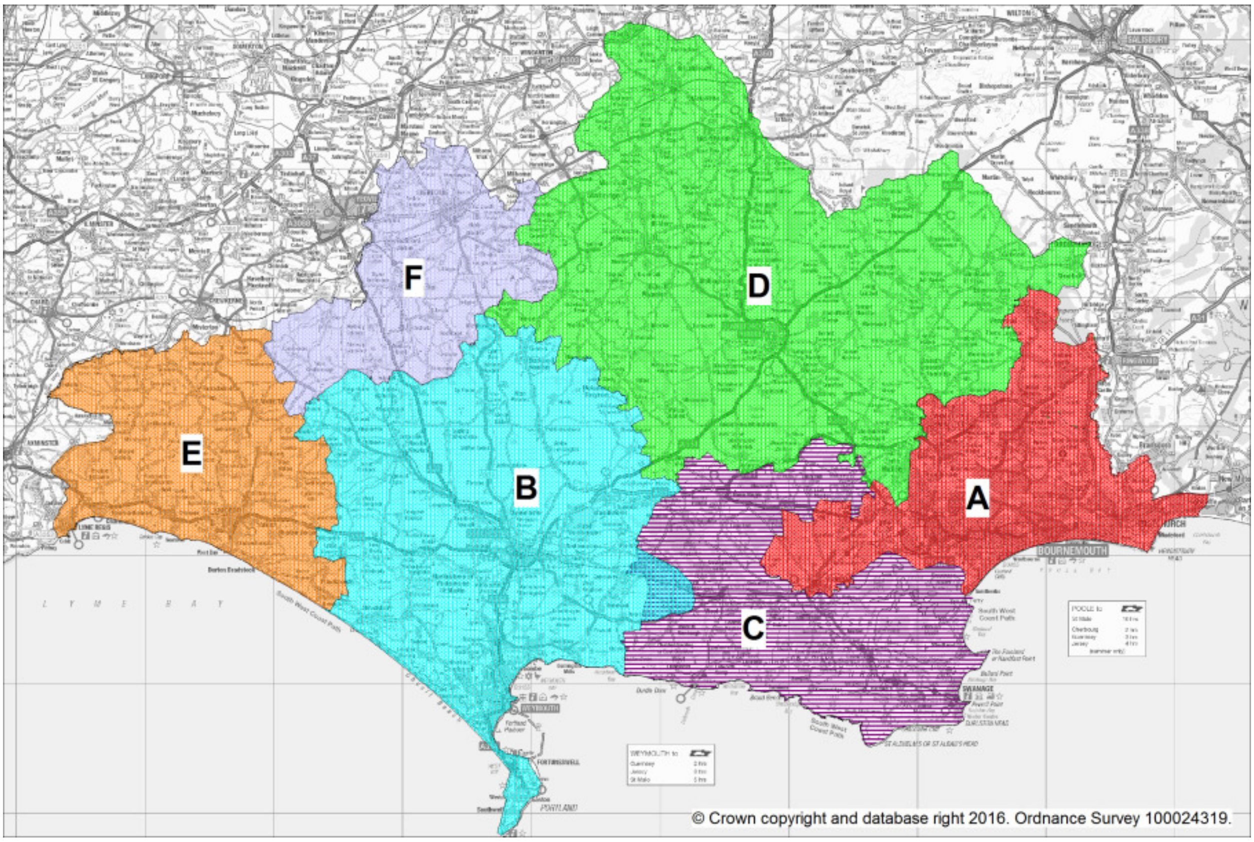
3.7 This commercial property market review has been prepared in consultation with commercial property agents working within Eastern and Western Dorset. A questionnaire was issued to commercial agents across the study area concerning the current and future performance of the office and industrial markets and future land and premises requirements. The questionnaire and record of the responses received is set out in Appendix D. Additionally, meetings were held with commercial agents in Western and Eastern Dorset to explore these issues in greater detail. This analysis also takes on board the views of local authorities through consultation with planning and economic development officers. This review section has also utilised data from the Property Pilot data base and the relevant national data sources.

MARKET AREAS

3.8 In consultation with commercial property agents from the Dorset LEP area, local authority planning and economic development officers the following commercial property market areas and centres for office and industrial activity have been identified:

Commercial Property Market Areas
A: Eastern Dorset: including Bournemouth, Poole, Christchurch, Bournemouth Airport Business Park, Ferndown, Wimborne, Woolsbridge Industrial Estate (3 Legged Cross) and Ebblake Industrial Estate (Verwood), Holton Heath, Upton, Wareham, Wallisdown/West Howe;
B: Dorchester, Weymouth and Portland, Winfrith (Dorset Green Technology Park - *note this is also in C*).
C: Winfrith (Dorset Green Technology Park), Swanage and other parts of Purbeck.
D: Blandford Forum, Sturminster Newton, Shaftesbury, Gillingham and other parts of North Dorset.
E: Bridport, Lyme Regis, Beaminster.
F: Sherborne and surrounds (with influence / linkages to Yeovil)

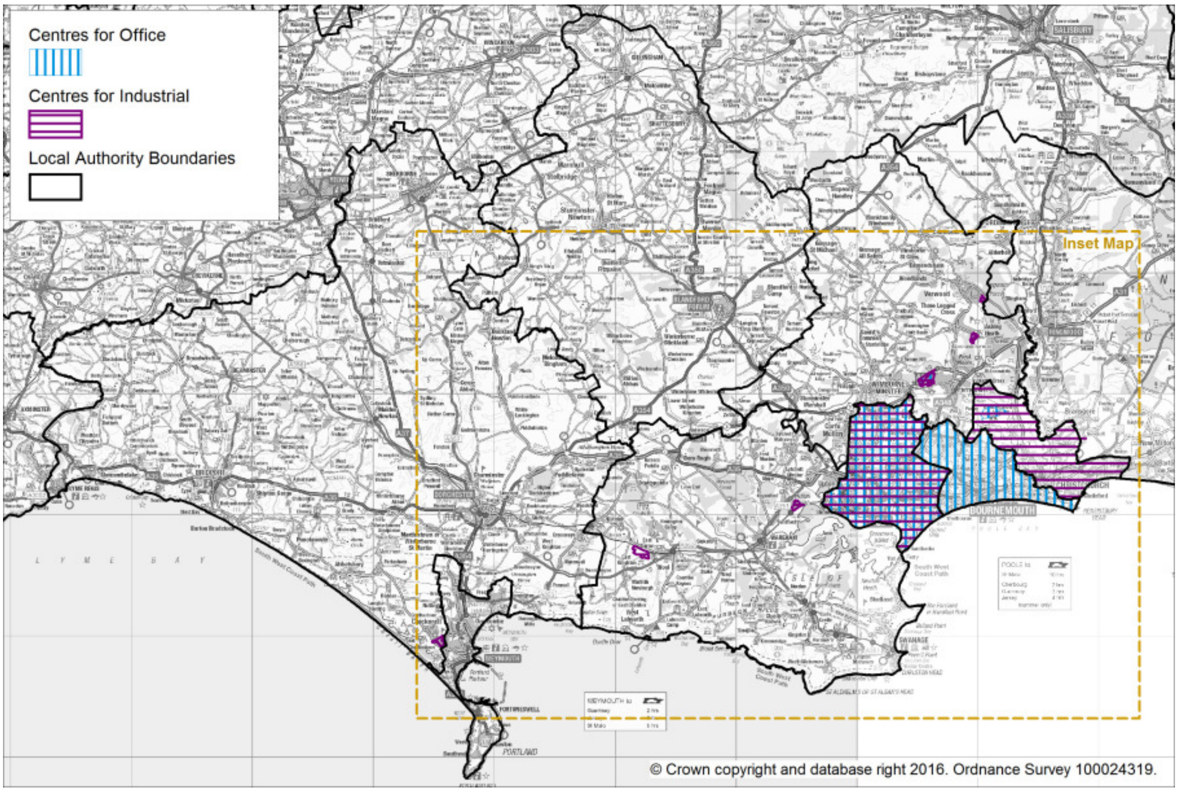
Table 3.1 Commercial Property Market Areas



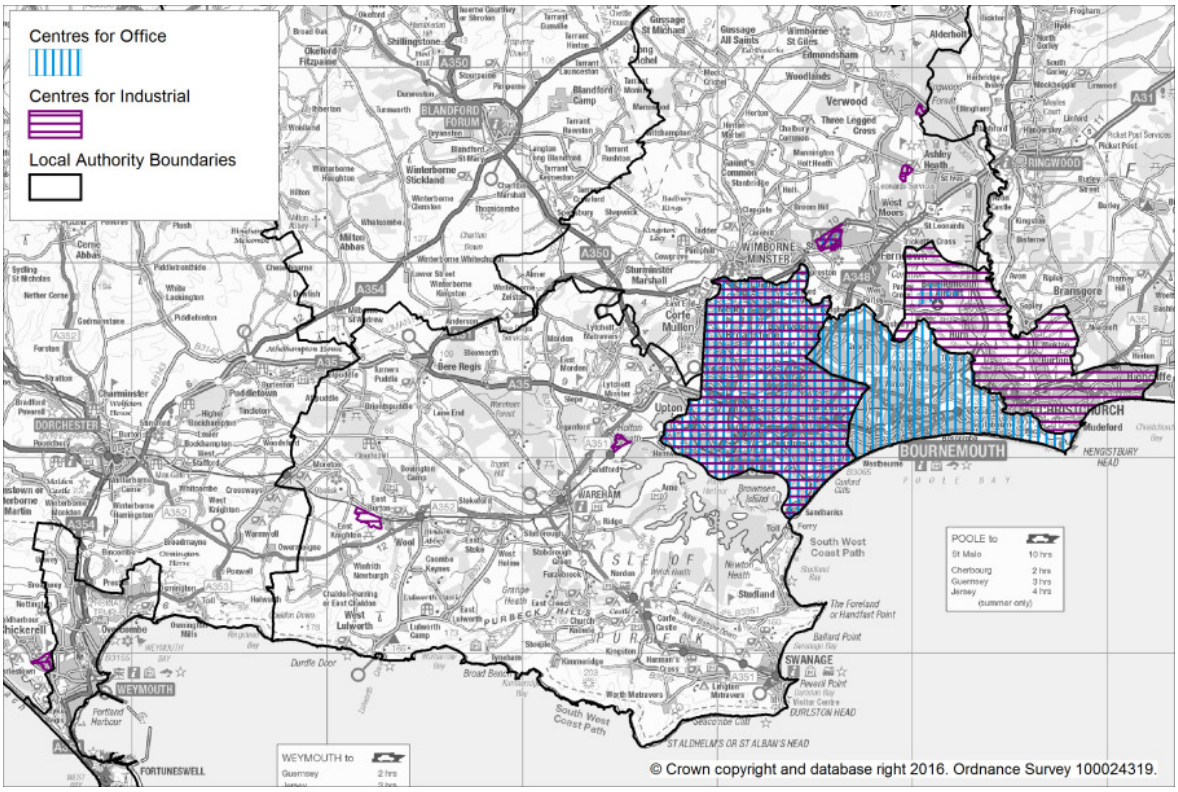
Map 3.1 Commercial Property Market Areas

Centres for Office and Industrial
A: Office – Bournemouth and Poole with supporting roles of Bournemouth Airport Business Park and Ferndown Industrial Estate.
B: Industrial – Poole, Bournemouth Airport Business Park, Christchurch, Ferndown Industrial Estate, Woolsbridge (3 Legged Cross), Ebblake Industrial Estate (Verwood), Winfrith, Holton Heath and Wallisdown / West Howe and the Granby Industrial Estate, Weymouth.

Table 3.2 Centres for Office and Industrial



Map 3.2 Centres for Office and Industrial (Dorset)



Map 3.3 Centres for Office and Industrial (Enlarged Inset)

NATIONAL MARKET OVERVIEW

3.9 This section examines the national economic market which sets the context for the analysis of the local commercial property market. Information on the economic and property market has been based primarily on research published by Bilfinger GVA[(1)]. The section below provides an overview of:

- the UK economic market.
- recent occupier market performance
- the commercial property market outlook and
- recent investment performance

THE UK ECONOMIC MARKET

3.10 Despite a slowdown in economic growth in 2015 the UK remains one of the fastest growing developed economies. However, while the UK economy continued to add jobs during 2014 total productivity fell by 0.1%. Although output is now 4% higher than in the pre-recession peak in 2008, output per worker is still 4% below that level. Raising productivity is one of the main challenges facing the UK economy in the medium term.

OCCUPIER MARKET / COMMERCIAL PROPERTY MARKET / COMMERCIAL PROPERTY MARKET OUTLOOK

3.11 The latest RICS Commercial Market Survey (Q1 2015) gives an optimistic outlook for commercial occupier demand. The survey also suggests that availability continued to decrease over the first three quarters of the year (2014/15) encouraging strong rental expectations.

3.12 Average rental growth for offices outside London and the South East has increased over the past 3 months. Bilfinger GVA forecast 2% growth in 2015 followed by 3% pa over the next 3 years.

3.13 Over the 6 months to May 2015 the industrial sector saw diminishing supply, improving demand and a significant uplift in speculative development across the country. Take up of modern distribution units over 100,000 sqft amounted to 22.6 million sq ft in 2014, 11% above the five year average.

3.14 However the supply of good quality available units has seen a decline. GVA report that based on past take up rates, there is currently less than one year's supply of modern distribution units over 100,000sq ft across the country.

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1 Economic and Property Market Review May 2015. Bilfinger GVA

3.15 Rental growth in the industrial sector over the year stands at 3.0% (IPD quarterly index), the highest it has been since 2001. Bilfinger GVA forecast that rental growth will average around 3-4% for the next three years. A recent Colliers International report[(2)] highlights 'Phenomenal rental growth continues across the sector due to a lack of quality space and strength of the domestic economy.'

INVESTMENT MARKET

3.16 The annual value of property investment transactions reached nearly £69 billion over the 12 months to March 2015[(3)]. This was higher than the previous peak in 2007, when average capital values were a third higher than today. Overseas investors have pushed up demand. The high capital values have put pressure on property yields. Annual total returns on the IPD Monthly index peaked at 20.1% in October 2014 but fell to 18.3% as of March 2015. CBRE forecasts total returns of just under 13%[(4)] in 2015 with slightly lower returns (8-10%) in 2016 and 2017. Bilfinger GVA considers that recent performance indicates a total return from UK commercial property in 2015 of nearly 11%, suggesting a continued deceleration throughout the rest of the year. This still represents a strong level of performance compared to many other investment opportunities.

3.17 Looking forward, the outlook remains positive although since the UK's decision to leave the EU there is a perceived level of risk of investing in the UK and some degree of uncertainty for the economy.

All Property Total Return Forecasts			
	2015	2016	2017
IPF Quarterly Consensus (Feb 2015)	%	%	%
Maximum	18.8	17.0	8.4
Minimum	8.2	2.2	-0.5
Average	12.4	8.2	5.6
Bilfinger GVA (May 2015)	10.9	7.1	5.6

Table 3.3 All Property Total Return Forecasts (Source - IPF; RPFL; Bilfinger GVA.)

2 Colliers International Research and Forecast Report. UK Property snapshot January 2016

3 Property Data 2015

4 CBRE – UK Property Market Outlook 2015

CONCLUSIONS

3.18 The headlines above give an overview of the current national market context with short term projections for the direction of travel. Table 3.3 shows that current market conditions indicate a slowdown in total returns over the next couple of years. Problems of supply chains - for land and materials and labour shortages amongst professional construction services as well as site workers, need to be addressed in the short-medium term if the outlook is to remain positive.

3.19 The lack of prime industrial space is fuelling high rental levels in this sector across the UK. This also needs to be addressed in the short- medium term to ensure a plentiful supply of appropriate space.

3.20 However, the Workspace Strategy looks at the longer term and predicting long term market conditions is notoriously difficult. The recent turmoil in the markets following the slowdown of growth in the Chinese economy and falling price of oil and uncertainty following the UK's referendum vote to leave the European Union make it difficult to be certain how the market will respond over the next 10 – 15 years. For these reasons it will be necessary to test different growth scenarios in this study so that future local plans can be aligned to the most appropriate data.

BOURNEMOUTH, DORSET AND POOLE COMMERCIAL PROPERTY MARKET

EXISTING COMMERCIAL FLOORSPACE STOCK

3.21 The Valuation Office Agency (VOA) provides time series data to 2012 on the floorspace and rateable value of a range of classes liable for business rates. Statistics are shown as 31st March each year from 2000 to 2012.

3.22 The estimates of numbers of hereditaments, total rateable values, total floorspace and average RV per metre squared are derived from data for England and Wales extracted from the Valuation Office Agency's administrative database on 31st March 2012.

3.23 Table 3.4 shows that in Dorset – as in the South West and nationally – commercial floorspace is dominated by the industrial category. Within Dorset, the exceptions are:

- Bournemouth – with considerably more retail space than industrial space and accounting for the highest proportion of retail space in the Dorset LEP area
- Weymouth & Portland – with marginally more retail space than industrial space

3.24 Overall, total commercial floorspace in the Dorset LEP area fell by about 6,000m^2 between 2008 and 2012. This was contrary to the trend seen in the South West and in England & Wales generally. Increased floorspace was seen in Poole and in West Dorset, Purbeck and North Dorset. All local authorities in the Dorset

LEP area saw increased retail floorspace and ‘Other’ floorspace. A fall in office and industrial floorspace was evident in all Dorset local authorities with the exception of Purbeck which saw an increase in industrial floorspace.

- **Bournemouth** – has the second largest amount of commercial floorspace of all districts and ranks highest of all districts for retail, office and other floorspace, almost half of all its commercial floorspace is retail (47%) and 23% is office
- **Poole** – has the largest amount of commercial floorspace of all districts and ranks second highest for office, retail and other floorspace and highest by a long way for industrial, more than half its commercial floorspace is industrial (56%) and 24% is retail
- **Christchurch** – lowest floorspace of all districts for other bulk classes. more than half its commercial floorspace is industrial (52%) and 29% is retail
- **East Dorset** – third highest floorspace of all districts for industrial, almost two-thirds its commercial floorspace is industrial (65%) and 17% is retail
- **North Dorset** – lowest floorspace of all districts for office, almost two-thirds its commercial floorspace is industrial (64%) and 19% is retail
- **Purbeck** – has the smallest amount of commercial floorspace of all districts and the lowest floorspace of all districts for retail, more than half its commercial floorspace is industrial (55%) and 17% is other
- **West Dorset** – third highest of all districts for retail and office and second highest for industrial, more than half its commercial floorspace is industrial (55%) and 23% is retail
- **Weymouth & Portland** – lowest floorspace of all districts for industrial, 39% of its commercial floorspace is retail and 38% is industrial

Employment Floorspace Stock 2012									
	Retail		Office		Industrial		Other		All bulk classes
	Number	Floorspace	Number	Floorspace	Number	Floorspace	Number	Floorspace	Floorspace
	Count	*Thousands sqm*	*Count*	*Thousands sqm*	*Count*	*Thousands sqm*	*Count*	*Thousands sqm*	*Thousands sqm*
Bournemouth	2,720	*569*	820	*277*	570	*240*	400	*125*	*1,211*
Poole	1,340	*366*	680	*217*	1,340	*853*	260	*97*	*1,533*
DCC Dorset	4,130	*726*	1,840	*314*	4,570	*1,794*	1,630	*357*	*3,191*
Christchurch	550	*126*	190	*42*	330	*222*	130	*40*	*430*
East Dorset	580	*106*	410	*58*	1,000	*414*	280	*57*	*635*
North Dorset	580	*99*	280	*32*	780	*342*	250	*60*	*533*
Purbeck	420	*46*	170	*40*	530	*170*	230	*54*	*310*
West Dorset	1,210	*206*	610	*110*	1,470	*505*	460	*94*	*915*
Weymouth & Portland	790	*144*	180	*32*	450	*142*	290	*52*	*370*
Dorset LEP area	8,190	*1,661*	3,340	*808*	6,480	*2,887*	2,290	*579*	*5,935*
England and Wales	560,150	*118,151*	355,990	*92,720*	450,910	*323,101*	146,360	*41,798*	*575,770*
England	527,860	*111,198*	340,890	*89,250*	424,910	*304,853*	136,110	*39,114*	*544,415*
South West	53,020	*11,445*	28,740	*6,756*	48,850	*26,575*	17,350	*3,984*	*48,760*

Table 3.4 Employment Floorspace Stock 2012. Source: Valuation Office Agency, May 2012, Business Floorspace (experimental statistics)

LOCAL PROPERTY MARKET ANALYSIS

3.25 The following analysis has been informed by the property market questionnaire issued to commercial agents and subsequent agents meetings which examined a number of factors influencing investment potential within the Eastern and Western Dorset HMAs. This analysis also draws on the views of local authority planning and economic development officers.

INVESTMENT FACTORS EASTERN DORSET

3.26 Agents considered that in relation to Eastern Dorset there is insufficient employment land and premises of the right type, quality and location that is available in the short term to meet the needs of the market. In particular there is a shortage of larger sites/premises which are suitable and available. Businesses require instant/short term solutions which need to be facilitated by available premises and sites with planning permission. These factors are having a significantly adverse impact on investment potential. Meggitt is an example of where investment has been lost to this area with elements of the business relocating elsewhere in Dorset and also out of the County.

3.27 In addition to the availability of land and premises there are other factors that are influential in investment decisions. The availability of finance is also fundamental for commercial developments to come forward and a lack of available finance has been a key factor in limiting some investment in the study area which corresponds to the Dorset LEP area.

3.28 The issue of access to an appropriately skilled workforce is a national problem and is experienced to some degree at the local level with a number of companies stating that they have difficulty in recruiting and retaining staff. However, it is considered that overall in Eastern Dorset there is a relatively strong skills base locally to meet the needs of business with companies able to recruit and retain a suitably skilled workforce. This is particularly in relation to the finance, engineering, aviation and marine industries, which are supported by clusters of related activity within these sectors in the local area.

3.29 The availability of affordable housing across the whole of the Dorset LEP area is very significant in attracting and retaining skilled workers in the sub region and a lack of available affordable housing is considered a significant constraint. Affordable housing delivery and meeting objectively assessed housing needs is being addressed by local authorities through the Local Plan process.

3.30 A lack of direct access to the strategic road network in Dorset does have an adverse impact on inward investment. The New Forest is seen as a natural barrier to accessing the area from the east. However, it is also has a positive effect in terms of reducing the leakage of businesses out of the area, as it is perceived to be a major undertaking for businesses to mover further afield.

3.31 The distance to access motorways is a key issue and affects different types of business, including distribution. Poole, regarded as the area’s industrial hub, loses out due to the lack of available sites and also doesn't have good access to the strategic road network. As a consequence firms turn to employment space along the M27. It is considered that Eastern Dorset does not have sufficient choice in available sites to influence firms’ decisions to locate in the area in addition to transport infrastructure concerns.

3.32 Improvements in highways infrastructure will help to facilitate growth and improve prospects for economic investment. The planned A338 / B3073 improvements will provide extra capacity to the network to help unlock key employment sites such as Bournemouth Airport Business Park. However, the agents considered that these improvements would not be a game changer in stimulating inward investment.

3.33 Agents considered that a more radical solution is required in terms of a new strategic road through to Poole. New strategic highways routes have been examined as part of the South East Dorset Multi Modal Study (long term measures, beyond 2026). The study identified the potential for a new east – west strategic link between the B3073 Chapel Gate / A341 Magna Road and A31 Canford Bottom as a longer term strategic improvement.

3.34 Good quality of life is seen as a key factor in attracting and retaining skilled workers to the area. Quality of life in Dorset should be used more effectively to promote the area to inward investment as it is a unique asset.

3.35 The provision of high speed broadband is lacking in some areas and can be poor on outlying industrial estates. There is an increasing expectation from businesses seeking to invest that high speed broadband will be available. The situation is improving substantially with current roll out plans for high speed broadband across Dorset, but it is still a barrier to investment in some locations.

3.36 Support and responsiveness of local authorities through the planning process is also a key factor in influencing investment. The example of the Kondor development in Christchurch Business Park was given as a development that was ‘fast tracked’ by the local planning authority.

3.37 Simplification of the planning process was also considered significant in influencing planning decisions. The impact of Local Development Orders and Enterprise Zones were discussed and considered a positive tool for influencing investment decisions through the creation of simplified planning zones.

3.38 In terms of the relationship between the study area and wider markets it is still the case that London and the south east dominates the market in relation to inward investment.

3.39 In relation to the current state of the economy and prospects for inward investment it was considered that the rate of growth in Eastern Dorset is expected to cool over the next 6 – 9 months with concerns about the future prospects for the economy as a whole. The health of the commercial property market is also closely aligned to the housing market.

INVESTMENT FACTORS WESTERN DORSET

3.40 In relation to Western Dorset as a whole the following factors have a significant impact on the prospects for commercial investment. It is important to note however that there are variations between settlements across the area.

3.41 Good quality of life in Western Dorset is seen as a unique asset in attracting people to live and work in the area. This is a factor which is seen as particularly positive for the study area as a whole.

3.42 Agents consider that generally employment land and premises availability in Western Dorset is satisfactory to meet the needs of business. However, this is in the context of relatively low demand, particularly in comparison to the Eastern Dorset market.

3.43 When considering the ability to attract significant inward investment (over and above current levels of demand) there is a lack of suitable and available employment land and premises of the right type, size, quality and location to meet the needs of businesses that may seek to locate in the area. There is also limited land and premises capacity for businesses to expand which has adverse implications for retaining businesses currently located in the area.

3.44 In order to attract investment to the area it is important that sites come forward with the necessary infrastructure which needs to be secured through the planning process with landowners. A successful example of this is Barton Farm as a residential development that has brought forward infrastructure for employment development.

3.45 In Western Dorset there is a strength in the advanced engineering and manufacturing sector located on the Weymouth and Portland Area. Clusters of companies operating in this sector in the Weymouth and Portland area include Ultra Electronics, Sunseeker, Manor Marine, Global Marine systems, Tecan, ASM Assembly Systems, Universal Wiring Systems, AGC AeroComposites, Coda Octopus and IA G3 Systems. There are also a number of web based companies in Bridport which is a positive factor in attracting related industries.

3.46 Western Dorset is rural in character and overall does not have good access to the strategic road network or international transport links which is a significant barrier in attracting major investment to the area. However, agents have also noted that some businesses have chosen to locate in the area because of its environmental assets and remoteness.

3.47 The cost of labour, good availability of skilled workers and ability to retain workforce are viewed as positive factors in supporting local business and meeting the needs of inward investment.

3.48 Availability of affordable housing is a key factor in attracting people to live and work in the area. The availability of affordable housing to meet the needs of the workforce varies across the area and in this respect some areas are affected by shortages in affordable housing which has an adverse economic impact.

3.49 In term of site infrastructure access to high speed broadband is generally good across Western Dorset.

3.50 The commercial property market in Western Dorset is clearly different to Eastern Dorset with lower demand for land and premises and activity focused around Weymouth and Dorchester. The differentiation between the two housing market areas was emphasised by local agents from the west and is reflected in the Workspace Strategy employment land projections.

OFFICE MARKET

3.51 This analysis examines current and future performance of the office market within the geographical areas of the Eastern and Western Dorset HMAs.

CURRENT OFFICE DEMAND – EASTERN DORSET

3.52 Within Eastern Dorset agents have expressed the view that the office market is beginning to pick up following the economic downturn, however, they also note that the market has not fully recovered since the beginning of the downturn in 2008.

3.53 Market demand for office accommodation across the Dorset LEP area is mainly urban and concentrated in the Bournemouth and Ringwood area and Poole to a lesser extent.

3.54 Demand is dependent on the location, availability and quality of premises and agents have stated that there is a shortfall of suitable office accommodation in Eastern Dorset. They also expressed the view that existing office stock is not meeting the needs of business and key sectors such as the financial, creative and digital industries.

3.55 There is pent up demand for better quality office space which is generally not currently available. Overall current office provision in Eastern Dorset does not provide the appropriate quantity, quality and size of premises in the right location to meet the needs of the market. A considerable amount of current office stock is not fit for purpose and doesn't meet business needs.

3.56 Demand for serviced office accommodation increases and the present supply of providers cannot service all the demand. The lack of supply of serviced office accommodation could have a detrimental effect on the growth of the Creative/Digital sector which has recently seen an increase in demand with national publicity relating to the growth of this emerging sector in Bournemouth and Poole.

3.57 Enquiries for office space in Eastern Dorset tend to be in the range of <1,000sqft to 5,000 sq ft. Demand for larger premises is limited partly due to the availability of suitable larger premises to meet requirements. Enquiries for office space are made based on an understanding of what is available which subsequently limits the number of enquiries for larger office space.

3.58 Demand for office space and for better quality / larger premises would increase if this was available to the market. JP Morgan was given as an example of a company that would have taken up further office space had appropriate premises been available.

3.59 Speculative office builds are readily taken up but these are few and far between. It is considered that they are also not viable due to rental levels that can be achieved.

3.60 Agents believe there may be potential within Eastern Dorset for an office business park and it is hard to find serviced office accommodation. It was also noted that office could be better provided through mixed use schemes to assist with viability. However, there is a lack of these types of schemes coming forward and developments tend to be purely residential.

3.61 The industrial market in Eastern Dorset is considered to perform strongly in relation to the industrial market in Southampton and Portsmouth. However, the office market performs less strongly in relation to these areas in terms of available floorspace, take up of space and rental growth. However, this needs to be balanced against the national picture in terms of the domination of the London market and the south east.

3.62 In Eastern Dorset permitted development rights from office to residential have affected the availability of office accommodation to meet the needs of the market. This has had an impact in Bournemouth and Poole with examples of good quality stock being lost from the market. This has particularly affected the provision of serviced office accommodation with the loss of 3 providers, one of which lost a centre in both locations of central Bournemouth and Poole.

3.63 In Bournemouth there has also been a significant increase in proposals for student accommodation on office sites/buildings. However, the permitted development rights have also removed some poorer quality stock from the market. In the short term there is a risk that further prestigious office space will be lost to residential development affecting the supply of top end office accommodation in Bournemouth and Poole. Agents expressed a view that a point may be reached whereby the trend in loss of office accommodation may be reversed linked to the demand for good quality office space and financial return which in some cases may be higher than residential.

CURRENT OFFICE DEMAND – WESTERN DORSET

3.64 The office market in Western Dorset is substantially different to the Eastern area and presents a very different picture of demand. Western Dorset comprises large rural areas where there is very limited demand for rural office space. There is small scale demand for office accommodation in Dorchester and no real office market in Weymouth. Within Western Dorset demand for office accommodation is mainly for serviced offices. There is also currently an oversupply of office accommodation in Yeovil (Somerset) (linked to Property Market Area F) which has reduced demand in Western Dorset.

3.65 Some good quality, purpose built office accommodation has come forward as speculative development on Poundbury in Dorchester. However, these units have taken 6 years to fill and there remains limited demand for office overall in Western Dorset.

3.66 There exists a quasi-office market where there is some demand for office space from firms that are also producing and manufacturing. This is demand that can be met from traditional industrial units that incorporate office. For example, Parkway Farm at Poundbury was originally allocated for B2 (general industrial) and B8 (warehousing) and now includes a number of employers that are office based.

3.67 Enquiries for office space in Western Dorset are for smaller units from <999 sq ft to 2,000 sq ft. The view of agents is that there is an oversupply of office accommodation in Western Dorset and there is no significant issue with the quality of stock that is available.

3.68 Agents also stated that the impact of office to residential permitted development rights has been limited and this has not adversely affected the supply of office accommodation to meet the needs of the market in Western Dorset.

PROPERTY PILOT OFFICE ENQUIRIES & AVAILABILITY

3.69 The following section sets out the level of enquiries for office accommodation recorded through the Property Pilot data base for Bournemouth, Dorset and Poole for the period from October 2014 to October 2015.

3.70 Office enquiries for Bournemouth and Poole for the year October 2014 to October 2015, 126 enquiries in total, show the highest demand (74 enquiries) for small offices up to 999 sq ft, followed by 38 enquiries for the range 2,000 to 4,999 sq ft and only 1 enquiry for offices in the range of 25,000 to 50,000 sq ft.

3.71 Outside of Bournemouth and Poole 99 enquiries were received for the same period revealing 74 searching for the smallest range up to 999 sq ft, again the 2,000 to 4,999 sq ft was the next most popular size of 21 enquiries, 10 enquiries for 5,000 to 24,999 sq ft and only 1 for over 25,000 sq ft to 50,000 sq ft.

3.72 As of November 2015 the Property Pilot data base for Bournemouth, Dorset and Poole has identified the following office availability by number of units as shown in Table 3.5.

Office Availability (Bournemouth, Dorset and Poole)			
	Office	Serviced Office Centres (with little/no availability)	Total
Bournemouth	70	4	74
Christchurch	7	1	8
East Dorset	45	1	46
North Dorset	17	1	18
Poole	51	1	52
Purbeck	11	0	11
West Dorset	40	1	41
Weymouth & Portland	9	1	10

Table 3.5 Office Availability (Bournemouth, Dorset and Poole)

FUTURE DEMAND FOR OFFICE (EASTERN & WESTERN DORSET)

3.73 Agents consider that over the next 5 – 10 years there will be an increased demand for office space within Eastern Dorset. Demand is predicted to remain healthy for smaller units (<1,000 sq ft – 10,000 sq ft) and with increased demand for larger premises (10,000 sq ft – 50,000 sq ft). Agents expressed a positive view in relation to office demand going forward, with demand for better quality stock as existing buildings age. In order to meet future requirements there is a need to provide better quality and larger office accommodation. There is a lot of currently occupied office accommodation that is becoming obsolete which will need to be replaced in order to retain key businesses in the area.

3.74 There is a need to provide further office accommodation in centres for office including Bournemouth, Ringwood and Poole. In order to meet future requirements there is a role for outlying sites that provide a mix of office and industrial accommodation. However, office space needs to be provided in accessible locations which are not affected by high levels of traffic congestion. Traffic congestion was identified as a barrier to investment in the conurbation as a whole. Bournemouth Airport Business Park is an example of where some investment opportunities have been lost due to concerns about traffic levels.

3.75 For new office developments it is important that sufficient parking is provided to meet needs in order for premises to be attractive. This needs to be taken into account in the consideration of applying parking standards for new development.

3.76 In looking ahead over the next 10 years the office market in Western Dorset is not predicted to change substantially with limited prospects for growth focused primarily around Dorchester. However agents stated that demand may increase for moderately for slightly larger units from 1,000 sq ft to 5,000 sq ft.

3.77 The future focus of the office market is predicted to remain in Eastern Dorset and mainly within Poole and Bournemouth.

INDUSTRIAL MARKET

CURRENT INDUSTRIAL DEMAND – EASTERN DORSET

3.78 Overall demand is now starting to increase for industrial accommodation. Demand for industrial units remained healthy during the economic downturn and remains strong. Demand is however, dependent on the location, availability and quality of premises and agents consider there is a shortfall in Eastern Dorset.

3.79 Recent examples of industrial developments include those brought forward by Glenmore at Holton Heath, Purbeck. Brixey Business Park in Poole has also witnessed a very successful take up from investors and lettings.

3.80 Overall the view of agents in Eastern Dorset is that the current quantity, quality, size and location of industrial premises available to the market are insufficient to meet existing needs. Industrial supply is perceived as generally poor with not a significant amount of new industrial space coming onto the market.

3.81 Most enquiries have been recorded for smaller industrial premises (<1,000 sq ft – 10,000 sq ft). Levels of enquiries for larger premises are fewer due to the lack of larger available units. There is a particular need for larger premises in the region of 20,000 – 30,000 sq ft which would result in increased enquiries. The provision of larger premises would also free up smaller premises to the market from larger firms currently occupying multiple small units to better meet demand.

3.82 There is a need to encourage developers to bring forward larger premises but there is a lack of confidence that these will be taken up in comparison to smaller premises.

3.83 There also appears at present to be a resurgence in demand for rural workspace ranging from Craft/Studio/Workshop to small / medium Industrial units.

3.84 Although demand remains relatively strong for industrial units there are increasing instances of change of use to leisure uses such as gyms and keep fit studios and other leisure activities such as climbing walls. Over recent years there has also been an increased demand from other professional uses such as veterinary clinics, dentists and some other professional uses.

3.85 The proposed change in permitted development rights from industrial to residential is yet to be put in place and is expected to be subject to the same restrictions as office to residential. The view of agents across Eastern Dorset is that when this comes into operation it is unlikely to result in a significant loss in industrial accommodation. The general view is that these changes are misguided and the potential impacts have not been sufficiently considered. There is a need to secure a balance between housing growth and employment growth and the ability to achieve this balance is being constrained by these changes in permitted development rights.

CURRENT INDUSTRIAL DEMAND – WESTERN DORSET

3.86 Overall in Western Dorset agents stated that the existing supply of industrial accommodation does not meet current business requirements in terms of quantity, quality, location and the size of premises. In particular there is a shortage of light industrial space. There is also an unmet gap in the market for those that wish to buy units rather than lease.

3.87 Most enquiries have been recorded for smaller premises from <999 sq ft – 10,000 sq ft and with most demand for units between 1,500 – 3,000 sq ft. It is perceived that demand for industrial accommodation would be higher with additional supply in the right location.

3.88 The rental value of industrial units is low and relatively unprofitable which has an adverse impact on the supply of units to meet market requirements.

3.89 In Western Dorset agents also consider that the change in permitted development rights from industrial to residential is unlikely to result in a significant loss in industrial accommodation. As in Eastern Dorset the view is that these policy changes are misguided with the implications not adequately considered.

PROPERTY PILOT INDUSTRIAL ENQUIRIES / AVAILABILITY

3.90 The following section sets out the level of enquiries for industrial floorspace and land recorded through the Property Pilot data base for Bournemouth, Dorset and Poole for the period from October 2014 to October 2015. These figures are set out to provide a picture of the type of enquiries received across the whole of the study area. Since the 2008 Workspace Strategy was produced all those searching the commercial property database via the Internet search can now only select 3 locations and 2 unit types, this has enabled a more definitive search area for assisting with planning enquiries. However, it is important to note that reliance on

Property Pilot enquiries in isolation may lead to double counting as enquiries may be made for more than 1 type of land and premises under a single search. Therefore, this record of enquiries does not directly form part of the methodology for the employment land projections.

3.91 For the following unit types set out below maximum floorspace demand has been used.

3.92 **Craft/Studio/Workshop:** These units are found predominantly in the more rural areas of Dorset. Demand for the year October 2014 to October 2015 numbered 79 enquiries in all, 45 in the North Dorset, Purbeck and West Dorset and Weymouth area and 53 in the Christchurch and East Dorset area. The majority (79) are searching in the range up to 999 sq ft and 18 in the range 2,000 to 4,999 sq ft.

3.93 **Industrial:** 161 enquiries, the most popular band up to 999 sq ft with 98 enquiries amounting to a total floorspace required of 98,959 sq ft (8728.79 sqm), 54 enquiries in the band 2,000 to 4,999 sq ft amounting to a demand for 158,855 sq ft (14757 sqm) and 24 enquiries in the band 5,000 to 10,000 sq ft amounting to demand for 226,979 sq ft (21,086 sq m). There is evidence of 1 enquiry for larger demand over 100,000 sq ft up to 250,000 sq ft. 130 enquiries were for the SE Dorset conurbation area.

3.94 **Light Industrial:** 132 enquiries, the most popular band up to 999 sq ft received 100 of these enquiries amounting to demand for 99,502 sq ft (9243 sqm). Again the band 2,000 to 4,999 sq ft was the second most popular amount to 52 enquiries , 152,856 sq ft (14,200 sqm) and 14 enquiries for 5,000 to 10,000 sq ft amounting to 139,986 sq ft (13,004 sq m). Demand for the SE Dorset conurbation amounted to 98 of the total enquiries.

3.95 **Warehousing:** 91 enquiries, the most popular size band 43 enquiries for size band up to 999 sq ft amounting to 40,710 sq ft (3781 sq m), 16 in the size band 2,000 to 4,999 sq ft amounting to demand for 46,488 sq ft (4318 sq m) and 20 enquiries in the band 10,000 to 20,000 amounting to demand for 199,980 sq ft (18,578 sq m). A very small amount of evidence for searches above the size band of 25,000 sq ft even when analysing data from bespoke searches carried out by the Property Pilot Project Officer.

3.96 **Land/Serviced Land:** Clients searching the database online are often searching for land with a different use from that which is listed, e.g. small-holding plots, plant nurseries, storage for removals etc. when in fact the land/serviced land listed on Property Pilot is predominantly for the construction of employment space for example Osprey Quay, North Dorset Business Park.

3.97 84 enquiries listed in total of which 18 were carried out for consultancy purposes. Most popular size band is up to 2 acres (0.81 Hectares). Eight bespoke enquiries carried out by the Property Pilot Project Officer for plots of land no larger than 2 acres.

INDUSTRIAL AVAILABILITY

3.98 As of November 2015 the Property Pilot data base for Bournemouth, Dorset and Poole identified the following availability of industrial units as shown in Table 3.6:

Industrial Land and Premises Availability (November 2015)								
	Craft/studio/ workshop	Industrial	Land	Light Industrial	Serviced Land	Storage Land	Warehousing	Total
Bournemouth	0	9	0	0	0	0	0	9
Christchurch	0	20	0	0	4	1	0	25
East Dorset	0	38	1	0	1	0	1	41
North Dorset	2	40	1	2	13	0	1	59
Poole	0	72	2	8	2	1	2	87
Purbeck	1	16	1	9	0	3	0	30
West Dorset	1	51	3	8	0	2	2	67
Weymouth & Portland	0	7	5	2	0	0	0	14

Table 3.6 Industrial Land and Premises Availability (November 2015)

EMPLOYMENT LAND COMPLETIONS

3.99 The following table sets out the level of land developed for employment use within the Bournemouth, Dorset and Poole Study area for the period 2005 – 2015:

Employment Land Take Up 2005 – 2015 (Completed Developments)	
Area	**Land Developed (ha)**
Bournemouth	18.68
Christchurch	9.65
East Dorset	8.95
North Dorset	21.14
Poole	19.98
Purbeck	10.32
West Dorset	28.36
Weymouth and Portland	4.92
BDP Total	122

Table 3.7 Employment Land Take Up 2005 – 2015 (Completed Developments)

FUTURE DEMAND FOR INDUSTRIAL – EASTERN AND WESTERN DORSET

3.100 Agents consider that demand for industrial space will increase in Eastern Dorset over the next 5 – 10 years. An increase in demand is predicted across the board including smaller premises (<1,000 sq ft – 5,000 sq ft) and for larger premises (5,000 – 30,000 sq ft).

3.101 There are a number of good local companies that are experiencing strong growth in the area who will require new premises in the future.

3.102 As with office space agents state that there is an issue of a lack of suitable premises and land for industrial development that is available in the short term. There is a need to address issues with some allocated sites in the Dorset LEP area, some of which are not currently readily available due to infrastructure issues or lack of willingness of landowners to bring sites forward.

3.103 Greatest demand is for freehold premises (80-90%) and there is a shortage of these types of premises within Eastern Dorset.

3.104 In Western Dorset moderate growth is anticipated in the industrial market over the next 5 – 10 years. Growth in demand is predicted to be for smaller premises from 1,000 sq ft to 10,000 sq ft with some limited growth in demand for larger premises up to 20,000 sq ft.

OFFICE AND INDUSTRIAL MARKET PERFORMANCE WITH COMPETING AREAS (Southampton and Portsmouth)

3.105 The industrial market in Eastern Dorset performs relatively strongly in comparison to the industrial market in Southampton and Portsmouth. The office market performs less strongly in relation to these areas in terms of available floorspace, take up of space and rental growth. However, this needs to be balanced against the national picture in terms of the domination of the London market. Additionally some agents expressed the view that they do not consider Southampton or Portsmouth performs any better than Bournemouth in terms of the office market.

3.106 In Western Dorset the office market performs poorly in relation to competing areas outside the study area however the industrial market performs more positively. Agents in Western Dorset stated that it is only Eastern Dorset and Bournemouth that is able to compete with other areas such as Bristol.

DEMAND FOR READY-MADE EMPLOYMENT UNITS / VACANT LAND

3.107 In Eastern Dorset agents held the view that there is greater demand for ready-made units which provide a quick solution to market demand. There is a healthy demand for vacant land and land for open storage but the planning process is perceived as a barrier where there is not an existing planning permission. The potential length of time to obtain planning permissions is perceived as a barrier to investment decisions.

3.108 In general, businesses want an instant solution which more often than not is not available. By the time a solution is in place requirements have changed or a quicker solution found – Lush used as an example.

3.109 In Western Dorset agents also shared the view that demand is primarily for ready-made units which provide a quick and cost effective solution as opposed to vacant employment land.

3.110 The length of time taken to secure planning permission was seen as a significant problem and there is a need to bring forward sites with planning consent which are ready to go. Businesses are ‘fearful’ of the development process, hence the demand for ready built units.

3.111 However, it was acknowledged that this was not purely a planning problem as the delivery of sites was often subject to complex issues i.e. aspirations of site owners; access; infrastructure etc.

EMPLOYMENT LAND SUPPLY – EXISTING AND FUTURE REQUIREMENTS

3.112 In Eastern Dorset agents stated that overall existing employment land provision does not meet current and future requirements in terms of quality, quantity, type and location. They consider that the limited supply is not sufficient to provide choice in sites to meet business needs.

3.113 Some allocated sites within Eastern Dorset are not available in the short term due to infrastructure constraints such as the need for highway infrastructure improvements. Also availability is affected in some cases by a lack of willingness of landowners to bring sites forward in the short term. Cobham Gate was given as an example of a site which has taken a considerable amount of time to become available. In some instances landowners only wish to let to 'quality firms' which results in land remaining vacant until the desired occupier is found.

3.114 Agents commented that there is a perception of a limited amount of employment land that is available in the short term and this supply issue has pushed land prices up. An increase in land supply would help to address the issue of higher land prices and to stimulate development.

3.115 Developers need to be encouraged to deal with larger scale developments to meet existing and future requirements within the Dorset LEP area.

3.116 In Western Dorset overall it is considered that there is sufficient employment land to meet existing requirements however this needs to be examined on a settlement by settlement basis. The view of agents is that there is sufficient employment land supply in Weymouth and Dorchester, but an under supply of smaller industrial units in the Lyme Regis area. The image of employment sites is important to attract inward investment and this needs to be reflected in master planning work and how sites are brought forward to the market.

3.117 However, the supply of employment land and premises is not sufficient to enable a step change in the local economy above and beyond projecting forward existing trends in the economy.

BARRIERS TO SITES COMING FORWARD

3.118 In Eastern Dorset the most significant factors in preventing sites coming forward include the following:

- Transport infrastructure requirements
- Poor access to the strategic road network
- Environmental factors
- Availability of finance

3.119 Other notable factors include the need to improve public transport provision which is a particular factor in the attractiveness of outlying sites in Eastern Dorset.

3.120 Factors such as site image may come into play if there is a greater choice of sites that are available in the short term. A current lack of choice means that this is not yet a significant issue.

3.121 In Western Dorset the most significant factors in preventing sites coming forward include the following:

- Transport infrastructure requirements
- Lack of public transport
- Poor access to the strategic road network
- Lack of demand
- Availability of finance

3.122 Environmental factors were not considered to be a particular barrier to development and implications of AONB status and environmental designations are understood.

3.123 In this area agents consider there is a significant issue with land owners not making land available to the market until the required land values can be achieved. The cost of dealing with planning requirements and mitigation measures can be considerable and make employment development unviable.

MARKET ASSESSMENT SUMMARY

3.124 The National Market overview sets the context for the analysis of the Dorset LEP area commercial property markets. The UK economy is experiencing significant growth following the economic downturn in 2008 although growth forecasts have been downgraded in relation to a slowing of global and European markets and following the decision to leave the EU. The RICS Commercial Market Survey (Q1 2015) identifies increased growth and demand for offices and industrial premises in the national market and a shortage of supply. The investment market is also performing strongly with the annual value of property transactions above the previous peak reached in 2007. Bilfinger GVA identifies a positive overall outlook in the UK investment market to 2017.

3.125 In consultation with commercial agents and local authorities commercial property market areas have been identified within the Dorset LEP area. These areas constitute natural property market areas that form linkages between settlements, land use types and highways infrastructure. Through analysis of these local commercial property market areas it has also been possible to identify geographical centres for office and industrial development.

3.126 The focus of the office market is within Bournemouth and Poole with supporting roles provided by Bournemouth Airport Business Park and Ferndown Industrial Estate.

3.127 The main industrial market is concentrated in Bournemouth, Christchurch, Poole and Purbeck including Bournemouth Airport Business Park, Ferndown Industrial Estate, Woolsbridge Industrial Estate, Ebblake Industrial Estate, Winfrith (Dorset Green), Holton Heath, Wallisdown, West Howe and the Granby Industrial Estate, Weymouth.

3.128 Growth options for the future provision and distribution of employment land in this Workspace Strategy have been informed by market requirements for office and industrial development at a property market level and reflect these market centres for office and industrial.

3.129 In Eastern Dorset local agents consider that there is currently insufficient employment land and premises of the right type, quality and in the right location to meet the needs of the market in the short term. However, there is a considerable amount of employment land supply within Eastern Dorset and the key issue has been the availability of this land in the short term to meet the immediate needs of the market. This is in contrast to Western Dorset where local agents consider that the availability of employment land and premises is adequate to meet current business needs. This reflects the overall difference in the commercial markets between Eastern and Western Dorset where most demand is mainly focused in Eastern Dorset.

3.130 In Eastern and Western Dorset the availability of some key sites is constrained which has an effect on the ability to meet the short term needs of the market. The primary constraint to the delivery of employment land in the study area relates to the delivery of key transport infrastructure. This issue is being addressed by local authorities and the Dorset LEP through securing funding from sources such as the Growth Deal to help facilitate further development at Poole Port and Bournemouth Airport Business Park.

3.131 Current demand for office accommodation is mainly in Eastern Dorset and concentrated in Bournemouth, Ringwood and Poole. There is a shortfall in suitable office accommodation that is available and of the right quality, size and location in Eastern Dorset to meet the needs of key sectors including financial, creative and digital industries. In Eastern Dorset changes to permitted development rights have significantly affected the availability of office accommodation to meet the needs of the market. In contrast, in Western Dorset there is limited demand for office space with small scale demand concentrated in Dorchester.

3.132 Demand for office space in Eastern Dorset is expected to increase over the next 5 – 10 years with some increase in demand for larger premises. Future market demand for office is concentrated in Bournemouth, Ringwood and Poole with a supporting role from outlying industrial parks. Over the next 10 years the office market in Western Dorset is not predicted to change substantially with some limited growth around Dorchester.

3.133 Current demand for industrial accommodation in Eastern Dorset remains healthy and is the focus for industrial demand and growth in the study area. Agents consider that the current availability, quantity, quality, size and location of premises are insufficient to meet the needs of the market. In Western Dorset demand is also healthy for industrial premises and it is also considered that the current supply of industrial premises is insufficient to meet the needs of the market.

3.134 Future demand for industrial space is projected to increase in Eastern Dorset over the next 5- 10 years with increased demand for larger premises. In Western Dorset moderate growth is anticipated in the industrial market over this period. Growth in demand is anticipated for smaller premises with some limited increase in demand for larger premises.

3.135 In terms of competition with competing areas such as Southampton and Portsmouth, the industrial market in Eastern Dorset performs well. The office market in Eastern Dorset performs less well, however Bournemouth is considered to closely match the performance of these competing centres. In Western Dorset the office market performs poorly in relation to competing areas outside the study area, however the industrial market performs more positively.

3.136 In addition to the supply of employment land and premises, other significant factors affect the commercial property markets in Eastern and Western Dorset and the prospects for inwards investment. Other key factors include the lack of available finance, limited supply of affordable housing, relatively poor access to the strategic road network and the need for significant highways infrastructure improvements.

3.137 For both Eastern and Western Dorset good quality of life is considered a major factor in attracting businesses and workers to the area. In both Eastern and Western Dorset it is generally considered that there is a strong skills base locally to meet the needs of business and the ability to retain staff is strong.

3.138 The support offered by local authorities through the planning process and the simplification of the planning process through mechanisms such as Local Development Orders was identified as a positive factor.

4 Socio Economic Context

4.1 This socio-economic context chapter focuses on a selection of labour market and economic factors relevant to economic growth and the demand for employment land. These include:

- Population – current and projected growth by age band;
- Deprivation by area;
- Economic activity;
- Occupations and skills;
- Employment and earnings;
- Commuting (to follow);
- Businesses by size and sector; and
- Trend employment projections.

POPULATION

4.2 The total population of the Dorset LEP area is 765,700: Eastern Dorset (599,800), Western Dorset (165,900)[(5)].

4.3 Eastern Dorset has a higher proportion of its population aged 16-64 than Western Dorset, more in line with the Dorset LEP area but below the national figure. Western Dorset has the highest proportion of people aged 65+. All areas in Dorset have a lower proportion of children aged 0-15 than is seen nationally.

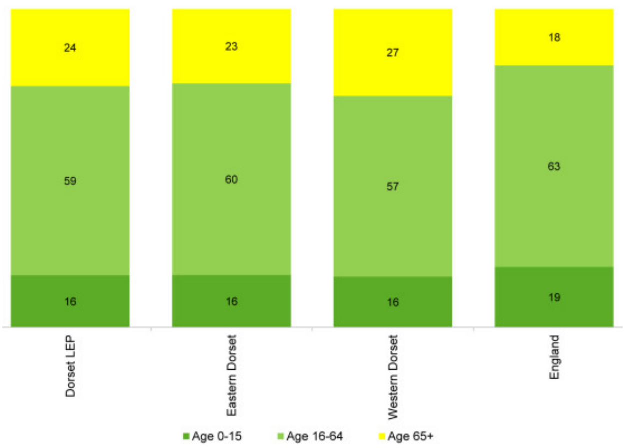

Figure 4.1 % population by age group, 2014 (Source: Mid-year population estimates (2015), ONS)

5 Source: Mid-year population estimates (2015), ONS

4.4 The male/female split is most balanced in Eastern Dorset, in line with the national average.[6].

Figure 4.2 % by gender, 2015 (Source: Mid-year population estimates (2015), ONS)

4.5 Looking at population projections for the Dorset LEP area, the total population is projected to increase by 7%[7] between **2013 and 2023**, which is marginally under the national projection. Eastern Dorset is slightly higher than the national average while Western Dorset is much lower. The highest projected increase in those aged 65+ is seen in Western Dorset; 22%, just over the England average. 0-15 year olds are projected to increase by 12% in Eastern Dorset, above the national average. The 16-64 age group is only projected a 2% increase in the Dorset LEP area with decline expected in Western Dorset. Figure 4.3 shows the percentage change in the population over 2013-23.

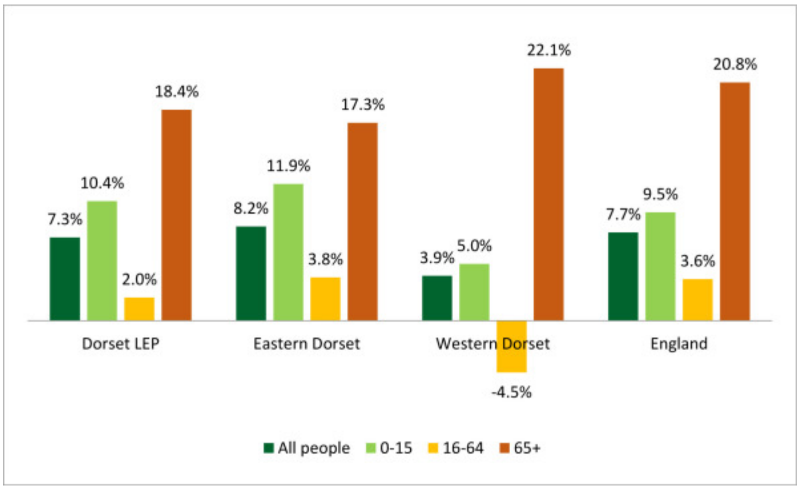

Figure 4.3 % population change 2013-2023 (Source: 2015-based Trend projections, Dorset County Council)

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6 Source: Mid-year population estimates (2015), ONS

7 Source: 2015-based Trend projections, Dorset County Council; and 2014 projections ONS for England

4.6 Between **2023 and 2033**, the total population of the Dorset LEP area is projected to increase by a further 6%, in line with the national average. Those aged 65+ are projected to see the biggest increase: by more than a fifth in Dorset and by 24% nationally. 0-15 year olds are expected to decrease in Western Dorset where there is also an expected decrease in 16-64 year olds. Figure 4.4 shows the percentage change in the population over 2023-33.

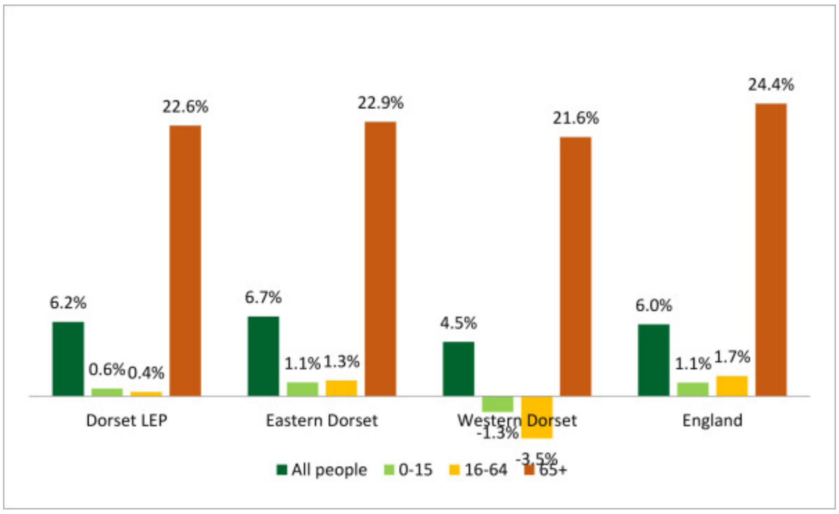

Figure 4.4 % population change 2023-2033 (Source: 2015-based Trend projections, Dorset County Council)

4.7 Looking at the broad ethnic groups, Eastern Dorset has the highest BME (black and multi-ethnic) population, however still much lower than the national average.

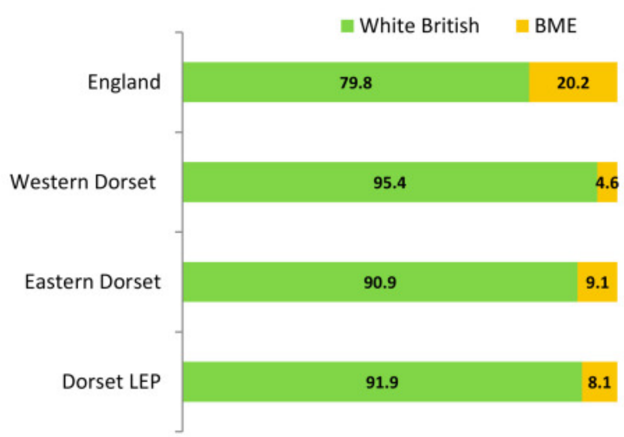

Figure 4.5 % by ethnic group, 2011 (Source: Census (2011), ONS)

DEPRIVATION

4.8 Six per cent of LSOAs[8] in Eastern Dorset are in the 20% most deprived nationally compared with 10% in Western Dorset, while 25% of LSOAs in Eastern Dorset are in the 20% least deprived nationally compared with 14% in Western Dorset. At the Dorset LEP area level, 25% of LSOAs in Western Dorset are amongst the 20% most deprived in the area, compared to 19% in Eastern Dorset and 11% of LSOAs in Western Dorset are amongst the 20% least deprived in the area, compared to 22% in Eastern Dorset. A similar pattern is seen for both income and employment deprivation; figures 4.6 and 4.7.

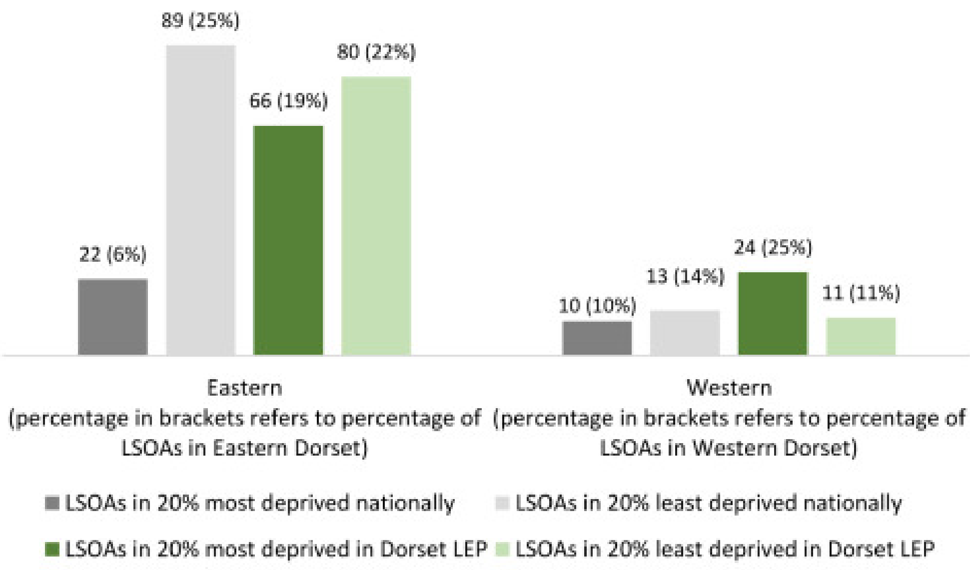

Figure 4.6 Index of Multiple Deprivation 2015 (Source: Indices of Deprivation, 2015, DCLG)

8 Lower Layer Super Output Areas (LSOAs) were first built using 2001 Census data from groups of Output Areas (typically four to six) and have been updated following the 2011 Census. They have an average of roughly 1,500 residents and 650 households.

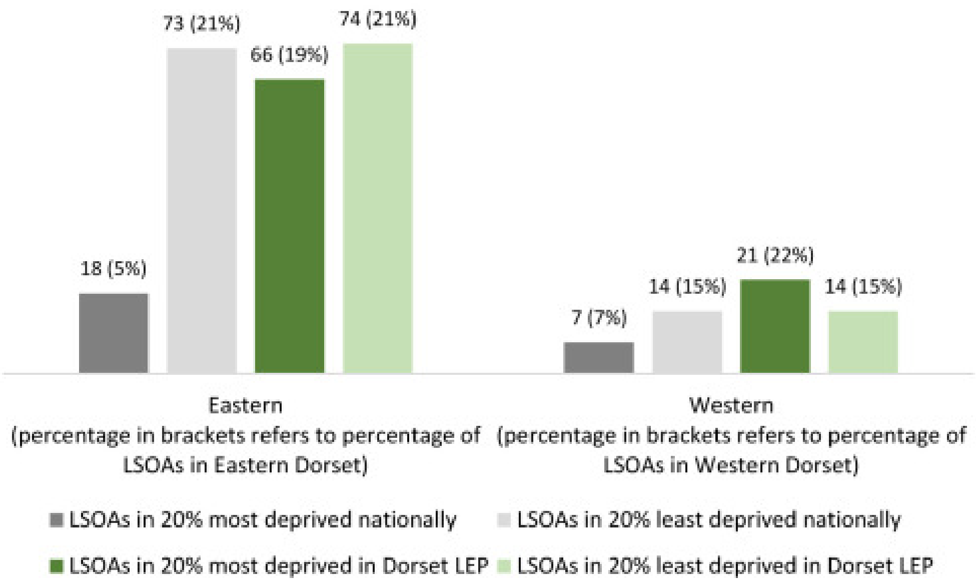

Figure 4.7 Income Deprivation ID2015 (Source: Indices of Deprivation, 2015, DCLG)

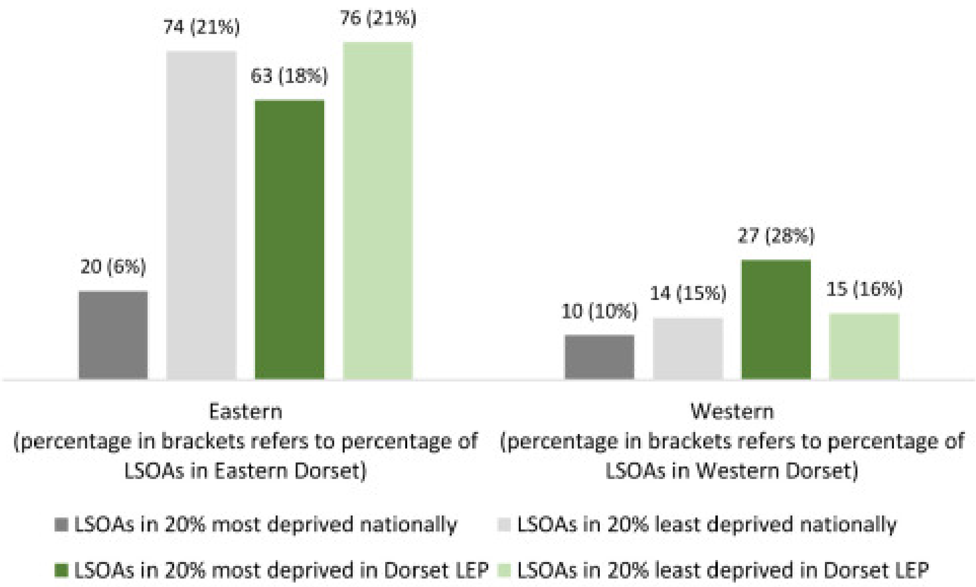

Figure 4.8 Employment Deprivation ID2015 (Source: Indices of Deprivation, 2015, DCLG)

ECONOMIC ACTIVITY

4.9 Just under four-fifths of 16-64 year olds in the Dorset LEP area are economically active[9]. Within this area, Eastern Dorset has a marginally lower proportion than Western Dorset but both are above the England average of 78.0%.

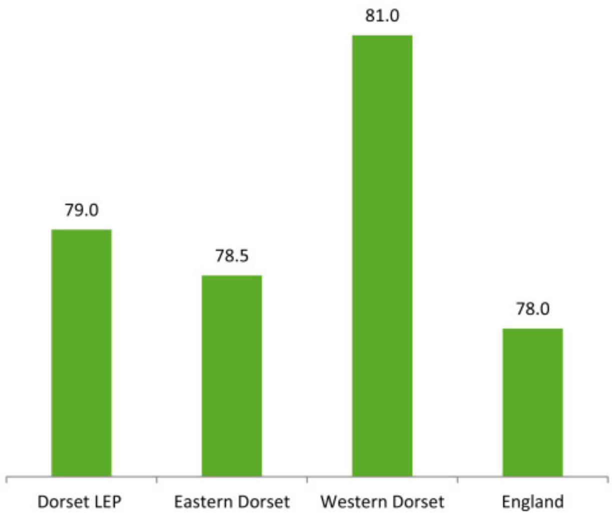

Figure 4.9 % 16-64 year olds economically active Jan 2015-Dec 2015 (Source: Annual Population Survey (Jan 15-Dec 15), ONS). Please note: this is a sample survey and therefore subject to sample error.

4.10 Employment rate rankings (of those aged 16-64) are slightly different to economic activity with Eastern Dorset having a higher rate than Western Dorset. The England average is 73.9% and so all areas of Dorset LEP area have an above average employment rate.

Employment rate (%), Jan 15- Dec 15	
Dorset LEP	76.3
Eastern Dorset	76.5
Western Dorset	75.8
England	73.9

Table 4.1 Source: Annual Population Survey (Jan 15-Dec 15), ONS

9 Source: Annual Population Survey (Jan 15-Dec15), ONS. Please note: this is a sample survey and therefore subject to sample error.

4.11 Self-employment is highest in Western Dorset at 11.9% of all people aged 16-64, higher than the Dorset LEP (10.5%) and England (10.4%) average and quite a bit higher than Eastern Dorset (10.2%).

4.12 Unemployment is slightly below average in the Dorset LEP area at 3.4%, compared with the 5.3% England average.

4.13 Claimant unemployment includes those claiming Jobseekers Allowance and Universal Credit. All areas in the Dorset LEP area had a below average claimant rate in 2015[(10)].

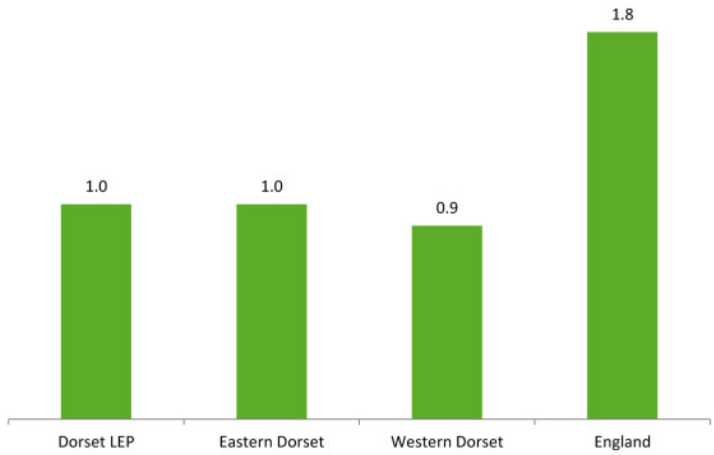

Figure 4.10 Claimant unemployment (% of all aged 16-64), Jan-Dec 2015 average

(Source: Claimant Count (Jan-Dec 15 average), ONS)

OCCUPATION LEVELS AND SKILLS

4.14 The percentage of employees working in high skill occupations (a grouping of Professional/managerial/ associate professional-technical)[(11)] is below average in Dorset, although Western Dorset is in line with the national average of 45%[(12)].

10 Source: Claimant Count (Jan-Dec 15 average) including Jobseekers Allowance and Universal Credit claimants. Percentage of those aged 16-64.

11 High skill occupations: Managers, directors & senior officials; Professionals; Associate professionals/technical occupations

12 Source: Annual Population Survey (Jan-Dec 15), ONS

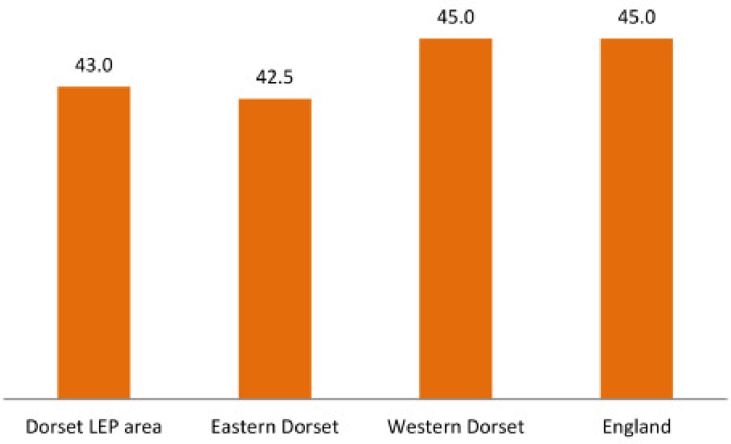

Figure 4.11 % employees working in high skill occupation, Jan - Dec 2015 (Source: Annual Population Survey (Jan 15-Dec 15), ONS)

4.15 Looking in more detail, the percentages of residents in professional occupations and in managerial occupations were about in line with the England average in Eastern Dorset, but the overall percentage in high skill occupations was pulled down by under representation of associate professional/technical occupations. Western Dorset had above average representation of residents in managerial occupations and also in associate professional/technical occupations, but under representation of professional occupations.

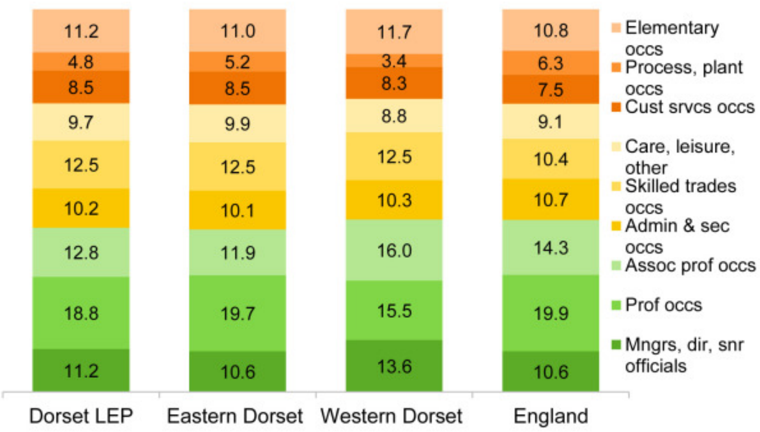

Figure 4.12 Broad Occupations (%), Jan - Dec 2015 (Source: Annual Population Survey (Jan-Dec 15), ONS)

4.16 Skill levels based on qualifications attained vary across the Dorset LEP area. Highly skilled residents (including NVQL3+) are more highly represented in Eastern Dorset where there is a higher proportion than the national average. Western Dorset has a much higher than average proportion of medium skilled residents: 28.9% compared to the England average of 19.4%.

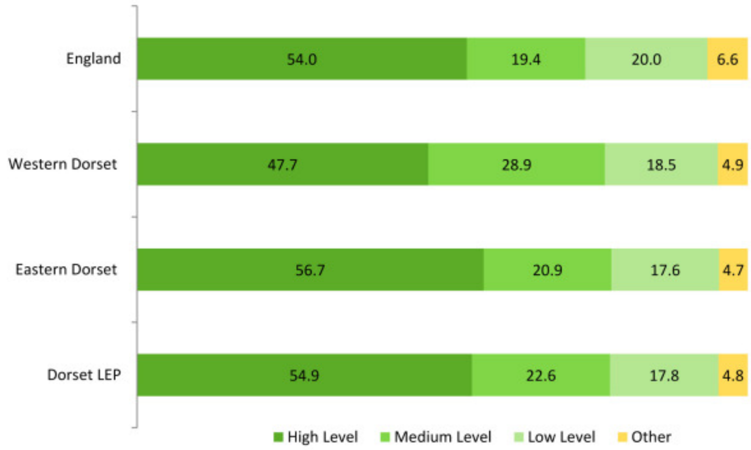

Figure 4.13 Skill levels (%) Jan - Dec 2015 (Source: Annual Population Survey (Jan - Dec 15), ONS)

4.17 A higher proportion of Dorset residents work 15 hours or less, 11.2% in Dorset LEP, than is seen nationally, 10%. Western Dorset has the lowest percentage of full time workers working between 31 to 48 hours with 52.2% compared to 55.2% in Eastern Dorset and 57.6% nationally.

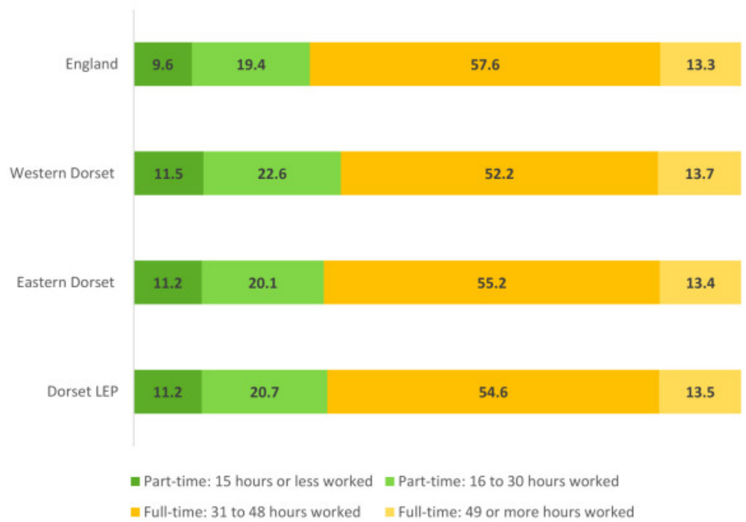

Figure 4.14 Part time and full time working, 2011 (Source: Census 2011, ONS)

EMPLOYMENT PROFILE

4.18 Approximately 250,300 employees are in employment in the **Eastern Dorset** area, including an estimate for agriculture for which statistics are not officially available below regional level. These account for four-fifths of employment in the Dorset LEP area (79%). The five largest sectors are:

- Wholesale & retail trade (17%) and representation is just over the GB average of 16%
- Human health and social work activities (15% of employees) and representation is higher than the Great Britain average of 13%
- Manufacturing (9%) with representation in line with the GB average of 9%
- Education (9%) and representation is in line with the GB average of 9%
- Accommodation/food services (9%) and representation is higher than the GB average of 7%

4.19 These five sectors account for 59% of all employment in the Eastern Dorset area, much in line with 60% in the Dorset LEP area generally and above the GB average of 54%.

4.20 A further 6% of employees work in the Professional, scientific & technical activities sector, below the GB average of 8%.

- In Eastern Dorset, employment in advanced manufacturing/engineering (including engineering services) at 6% is over the GB average (4%) and just above the Dorset LEP average of 5%
- At 3%, employment in the creative industries is in line with the Dorset LEP average of 3% and below the GB average of 4%
- Employment in tourism and leisure (direct) is above the national average at 8% compared with 6% in GB and in line with the Dorset LEP area as a whole

4.21 66,800 employees are in employment in the **Western Dorset** area, including an estimate for agriculture for which statistics are not officially available below regional level. These account for a fifth of employment in the Dorset LEP area (21%). The six largest sectors are:

- Human health and social work activities (17% of employment) and representation is much higher than the Great Britain average of 13%
- Wholesale & retail trade (16%) and representation is in line with the GB average of 16%
- Accommodation/food services (12%) and representation is much higher than the GB average of 7%
- Education (10%) and representation is in line with the GB average of 9%
- Manufacturing (8%) with representation much in line with the GB average of 9%
- Professional, scientific & technical activities (also 8%) and in line with the GB average

4.22 These six sectors account for 71% of all employment in the Western Dorset area, a higher percentage than 66% in the Dorset LEP area generally and above the GB average of 62%.

- In Western Dorset, employment in advanced manufacturing/engineering (including engineering services) at 3% is just under the GB average (4%) and under the Dorset LEP average of 5%
- At 2%, employment in the creative industries is just below the Dorset LEP average of 3% and below the GB average of 4%
- Employment in tourism and leisure (direct) is above average at 10% compared with 6% nationally and 8% in the Dorset LEP area as a whole

Earnings

4.23 Earnings data are available only to district level and should be treated with caution because of the likelihood of statistical error.

Workplace based earnings

4.24 In 2015 workplace based median gross weekly pay for full time employees were about 95% of the England average in Eastern Dorset and about 89% of the England average in Western Dorset. The highest workplace based earnings were found in Purbeck, Christchurch, Poole and East Dorset.

Residence based earnings

4.25 In 2015 in Eastern Dorset, residence based median gross weekly pay for full time employees was higher than workplace based pay and appeared to be about 97% of the England average. In Western Dorset, residence based earnings were also higher than workplace earnings and were about 94% of the England average. The highest residence based earnings were evident in Christchurch and East Dorset.

Availability of a car or van

4.26 Less than a fifth of households in Dorset LEP have no access to a car/van compared to just over a quarter nationally.

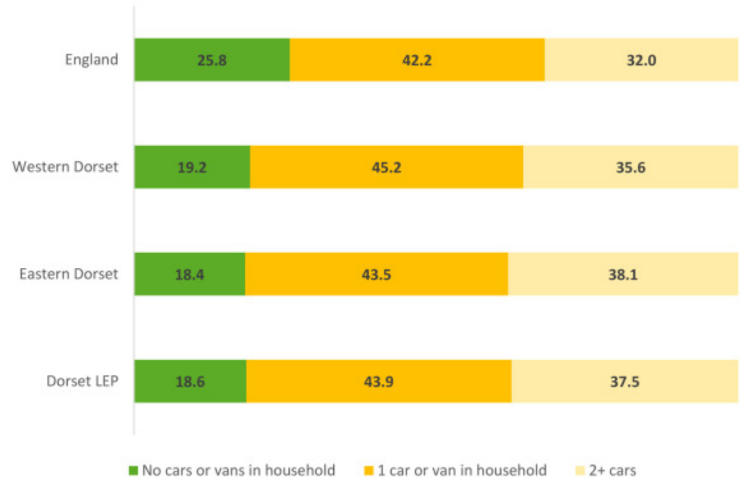

Figure 4.15 Availability of car/van to households

COMMUTING

Big numbers: commuting			
	Dorset LEP area	Eastern Dorset	Western Dorset
Net commuting gain/loss	-13,080	-10,800	-2,270
Workplace self-containment	92%	91%	85%
Resident self-containment	89%	87%	83%

Table 4.2 Commuting Key Statistics

Dorset LEP area

4.27 In terms of commuters, the Dorset LEP area acts as a functional economic area with workplace self-containment of 92% (percentage of workers living and working in the town or working at home or with no fixed workplace) and residence self-containment of 89% (percentage of working residents living and working in the town or working at home or with no fixed workplace).

4.28 In commuting accounts for just eight per cent of the workforce and the area has a net commuting loss of 13,100. More than a quarter of in commuters to the Dorset LEP area come from the New Forest (28%) and a further fifth come from South Somerset (20%).

4.29 The New Forest is also a significant out commuting destination with almost a quarter (23%) of Dorset LEP area out commuters travelling there. South Somerset is also an important commuting destination (14% of out commuters), closely followed by Wiltshire (10%).

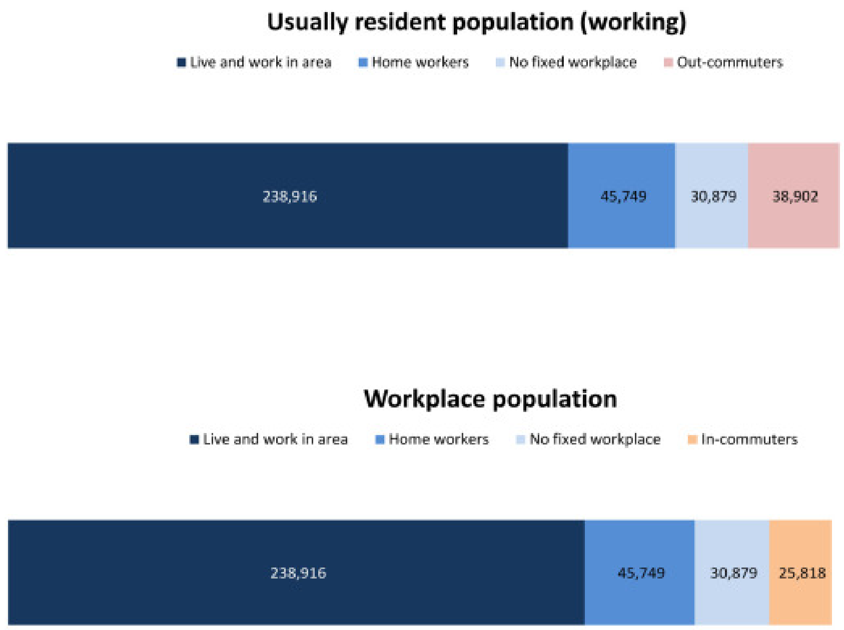

Figure 4.16 Commuting for the Dorset LEP area

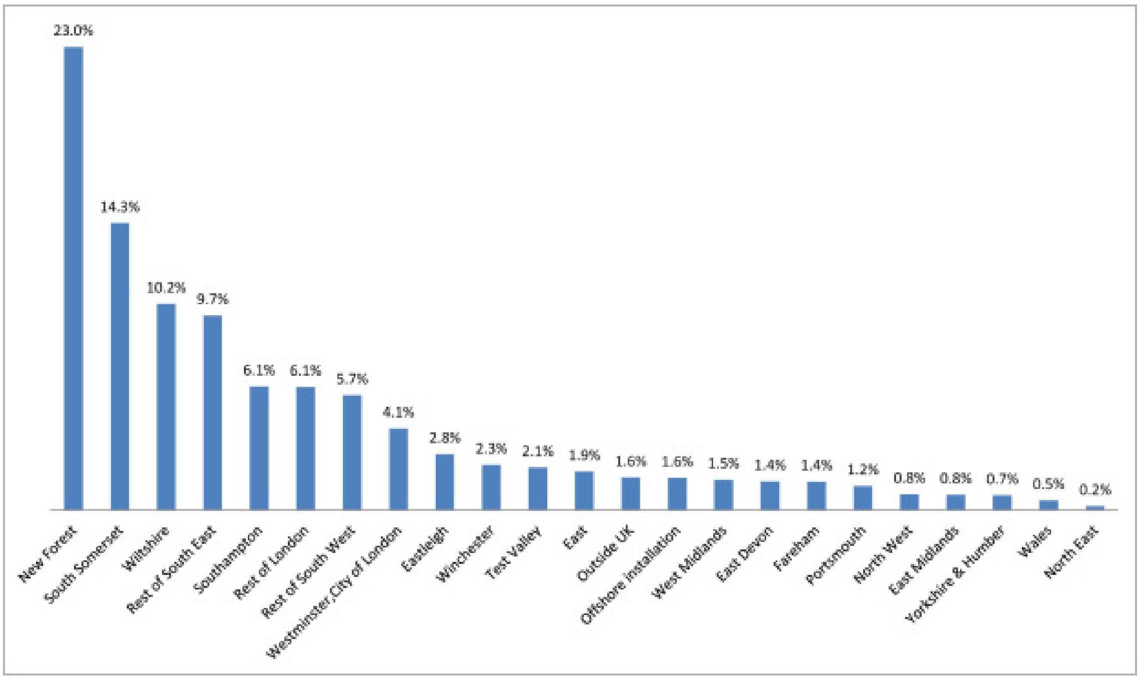

Figure 4.17 Dorset LEP area out-commuter destinations: % of 38,900 out-commuters

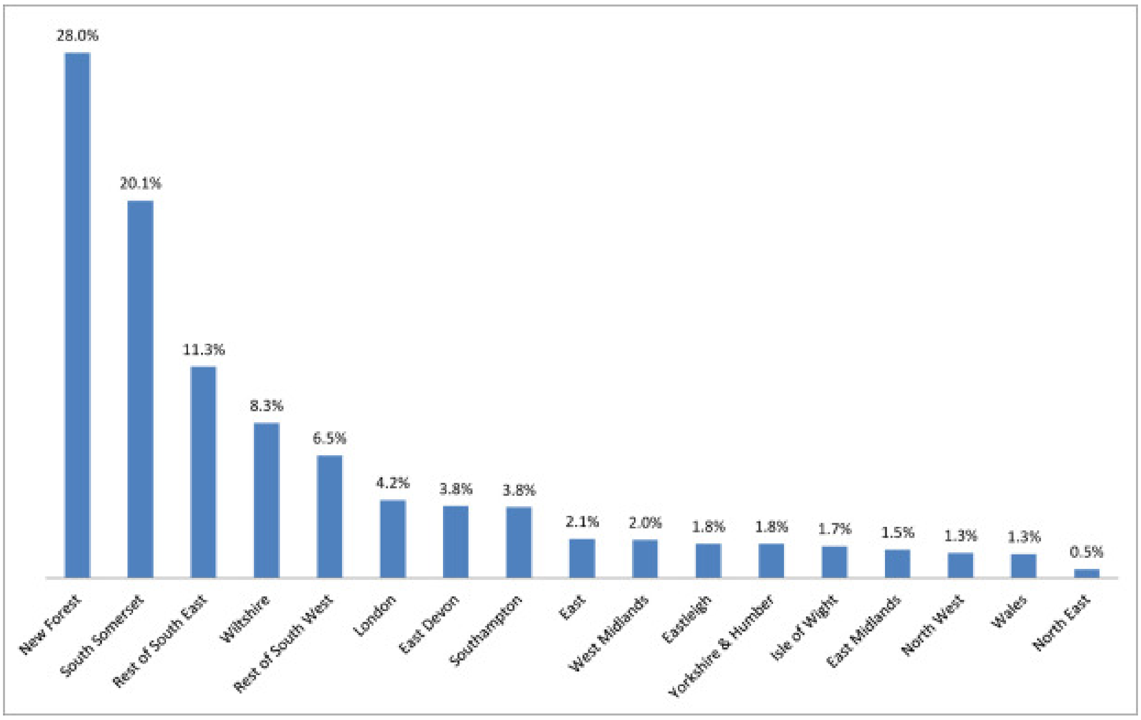

Figure 4.18 Dorset LEP area in-commuter origins: % of 25,800 in-commuters

Eastern Dorset

4.30 In terms of commuters, the Eastern Dorset area acts as a functional economic area with workplace self-containment of 91% (percentage of workers living and working in the town or working at home or with no fixed workplace) and residence self-containment of 87% (percentage of working residents living and working in the town or working at home or with no fixed workplace).

4.31 In commuting accounts for just nine per cent of the workforce and the area has a net commuting loss of 10,800. More than a quarter of in commuters to Eastern Dorset come from the New Forest (28%) and a further fifth come from the Western Dorset area (22%) – more details in the figures below.

4.32 The New Forest is also a significant out commuting destination with a quarter (25%) of Eastern Dorset out commuters travelling there. The Western Dorset area is also an important commuting destination (12% of out commuters travel there from Eastern Dorset), closely followed by Wiltshire (11%).

Figure 4.19 Commuting for the Eastern Dorset area

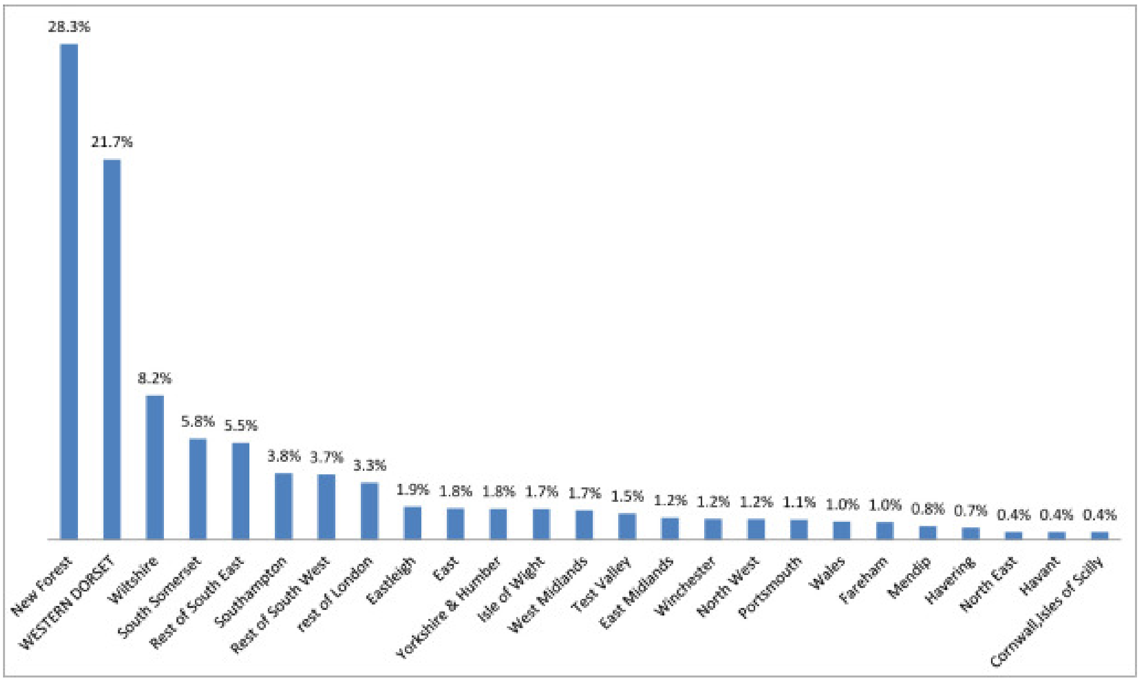

Figure 4.20 Origin of commuters to Eastern Dorset area: % of 24,330 in-commuters

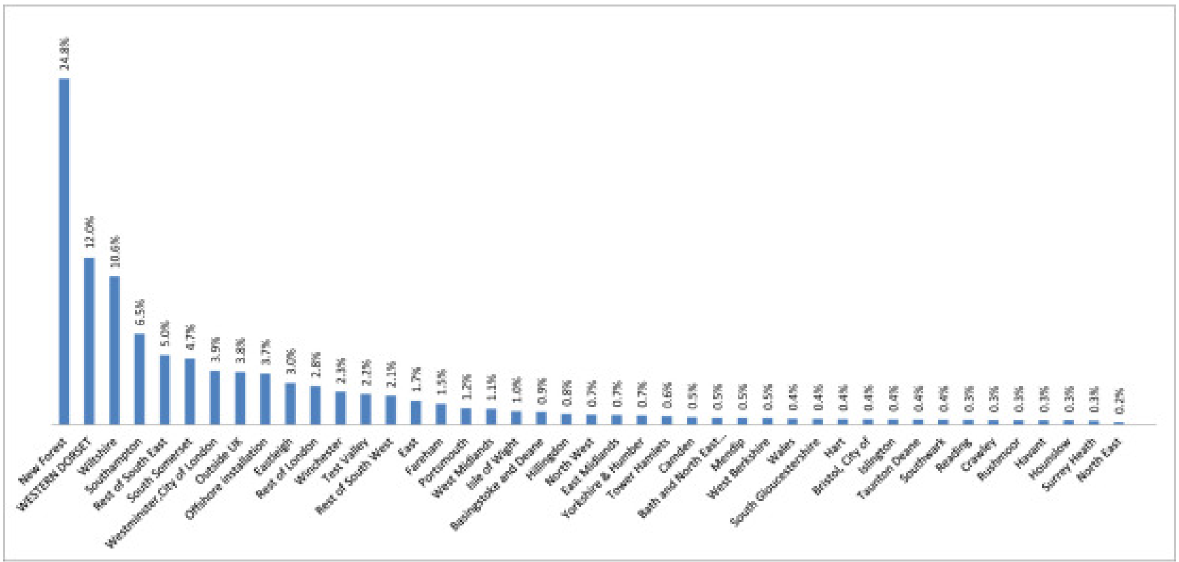

Figure 4.21 Destinations of commuters from Eastern Dorset Area: % of 35,140 out-commuters

Western Dorset

4.33 In terms of commuters, the Western Dorset area also acts as a functional economic area with workplace self-containment of 85% (percentage of workers living and working in the town or working at home or with no fixed workplace) and residence self-containment of 83% (percentage of working residents living and working in the town or working at home or with no fixed workplace).

4.34 In commuting accounts for 15% of the workforce and the area has a net commuting loss of 2,270. Eastern Dorset is the most significant origin of commuters to Western Dorset with almost 40% of in commuters travelling from there, (38%), and more than a third coming from South Somerset (35%).

4.35 Eastern Dorset is also the most significant out commuting destination with 40% of Western Dorset out commuters travelling there. South Somerset too is an important commuting destination (29% of out commuters from Western Dorset).

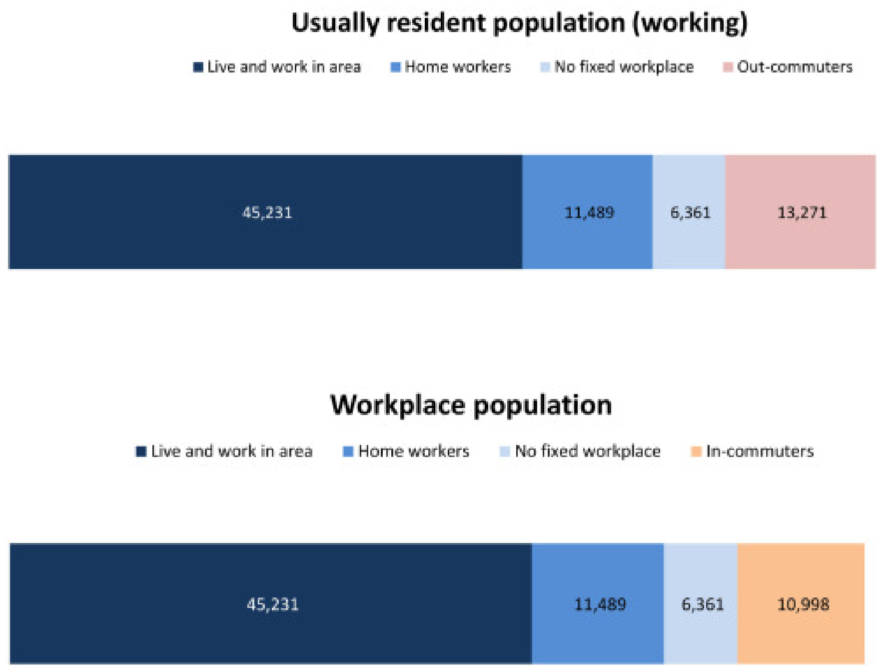

Figure 4.22 Commuting for the Western Dorset area

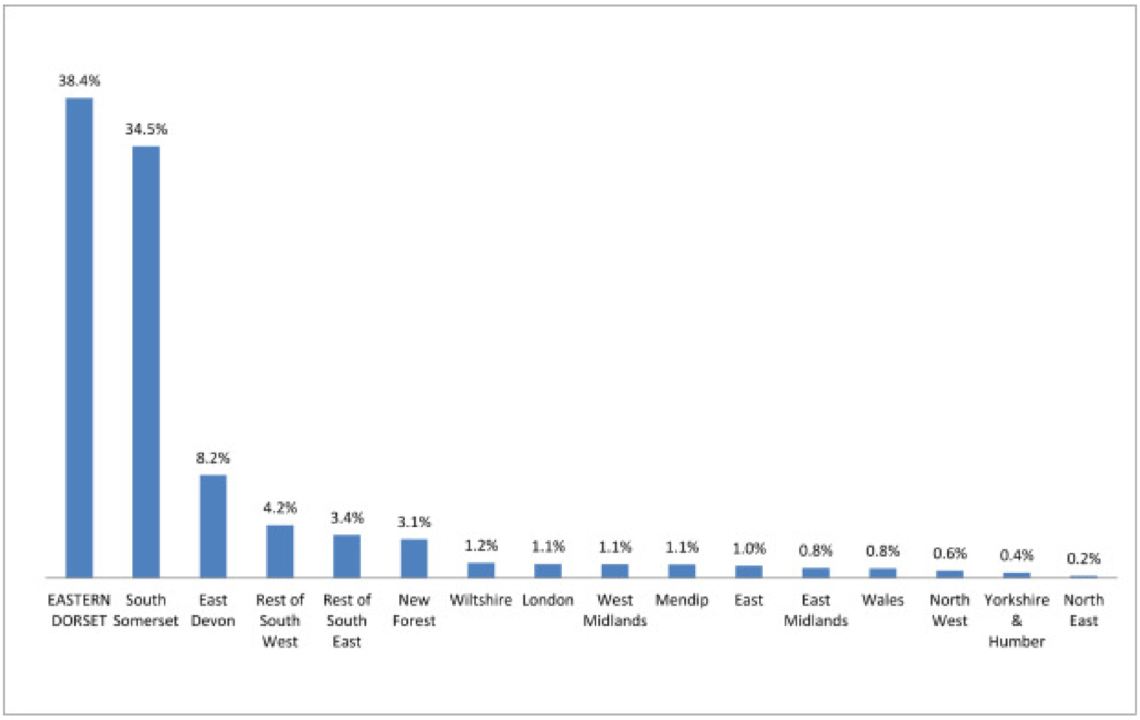

Figure 4.23 Origin of commuters to Western Dorset: % of 10,990 in-commuters

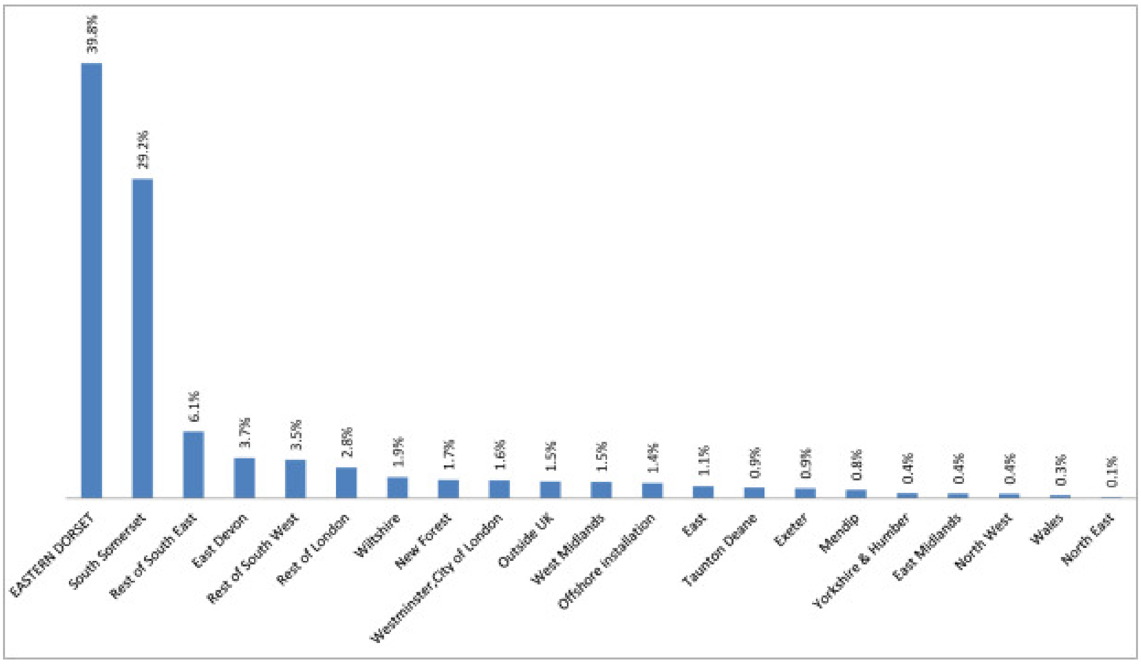

Figure 4.24 Destinations of Commuters from Western Dorset Area: % of 13,270 out-commuters

BUSINESS PROFILE

4.36 Representation of micro sized business units[13] is slightly higher in Western Dorset than both the county and national average, but otherwise the figures across all areas are very similar.

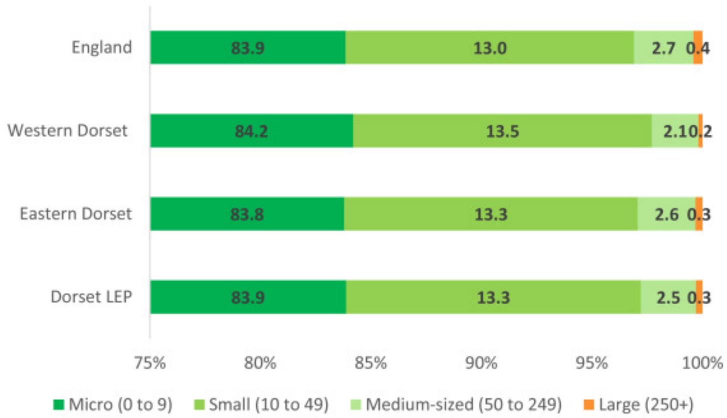

Figure 4.25 Business size bands (%),2015 (Source: UK Business Counts 2015, ONS)

13 VAT/PAYE registered only ie very small units excluded

4.37 There is higher business representation of Agriculture, forestry and fishing in Western Dorset (13.2%) compared to both the rest of Dorset and nationally (4.1%). Construction is highest in Eastern Dorset (13.2%) compared to 10.2% nationally.

Figure 4.26 Industry of business (%), 2015 (Source: UK Business Counts 2015, ONS)

HEALTH

4.38 Residents of Dorset are less likely than the national average to rate themselves as in very good health; Western Dorset has the lowest percentage with 43.6% of residents saying they are in very good health compared with 47.2% nationally.

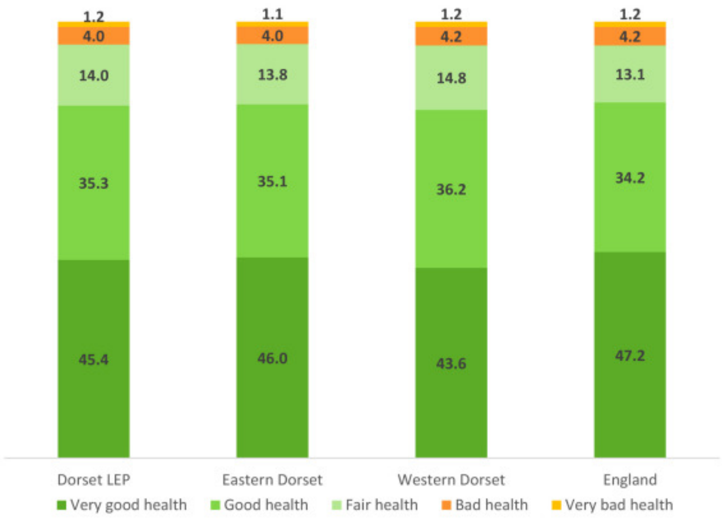

Figure 4.27 General Health 2011 (Source: Census 2011, ONS)

4.39 Western Dorset also has the highest proportion of residents with day to day activities limited a lot, 9.1% compared with 8.5% in the LEP area and 8.3% nationally, Eastern Dorset is in line with the national average. All Dorset areas have a lower proportion of residents whose day to day activities are not limited than is seen nationally.

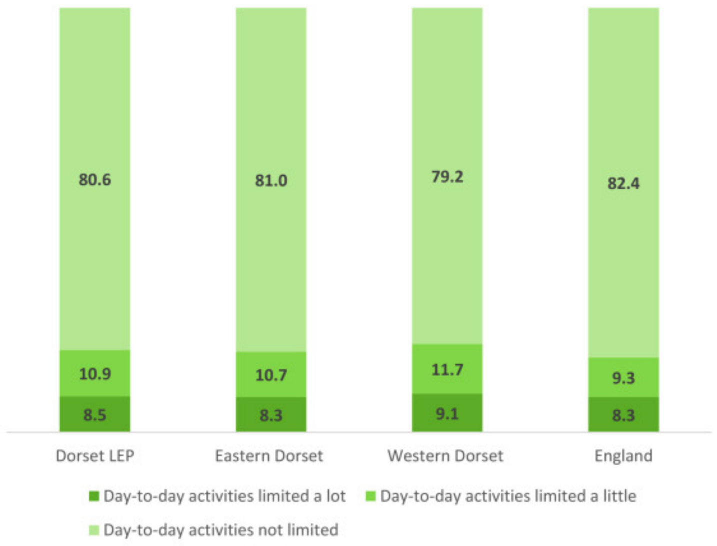

Figure 4.28 Long term health problem or disability, 2011 (Source: Census 2011, ONS)

4.40 All areas in Dorset have a higher proportion of economically inactive residents aged 16+ that are in very good or good health (59%) compared to the national figure of 57%.

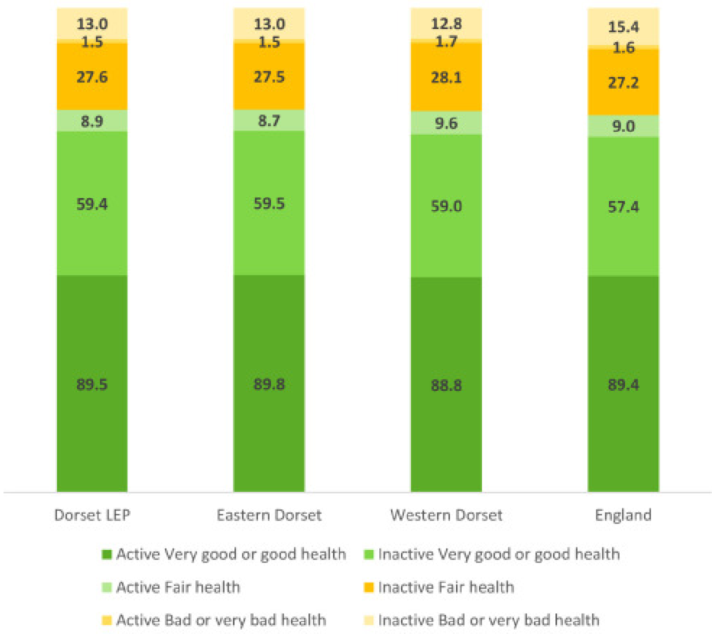

Figure 4.29 General health of residents aged 16+: economically active and inactive, 2011 (Source: Census 2011, ONS)

4.41 Western Dorset has the highest proportion of residents aged 16+ who provide unpaid care, 13.9% compared to 13.1% in the Dorset LEP area and 12.4% nationally.

4.42 15.3% of economically inactive residents in Western Dorset provide unpaid care compared to 14.8% in Eastern Dorset and 14.3% nationally.

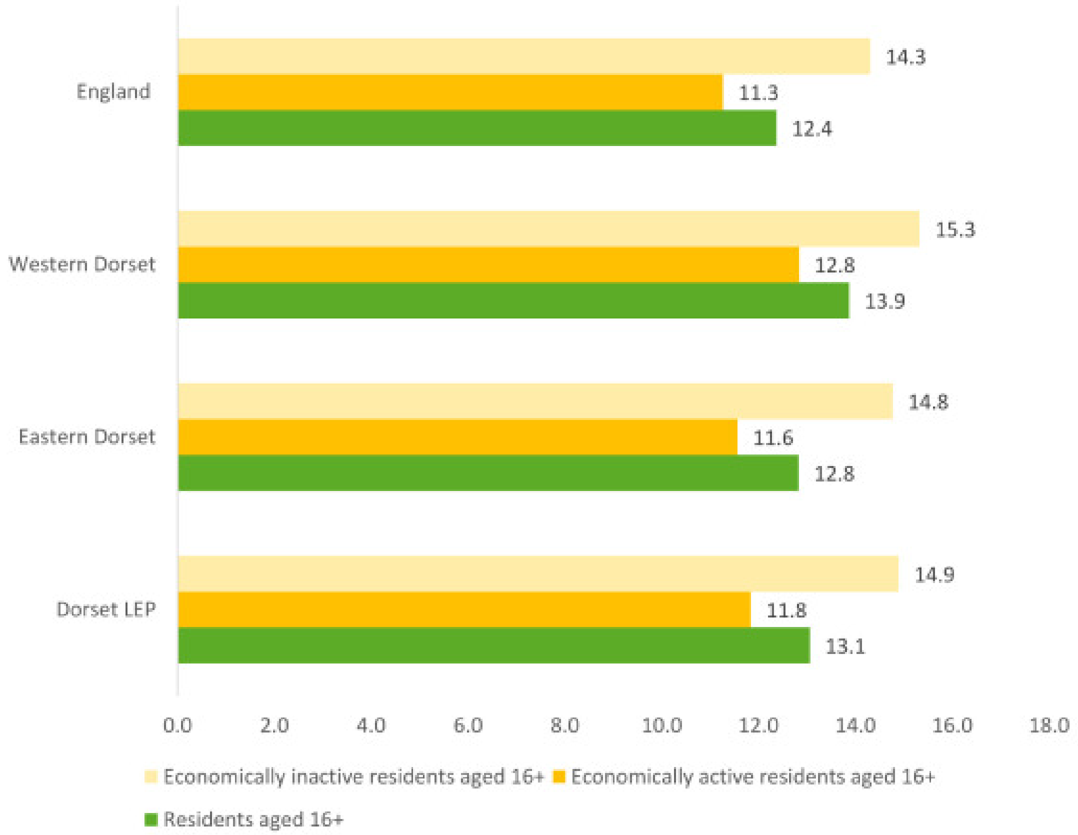

Figure 4.30 % Residents providing unpaid care (Source: Census 2011, ONS)

PROJECTED EMPLOYMENT CHANGES

4.43 Over the twenty year period to 2013, employment in the Dorset LEP area grew by about 63,000 in total (about 50,000 full time equivalents), which equates to growth of about 20% or 0.9% per annum. FTE growth was much the same.

4.44 In the same period, Western Dorset saw an increase of about 15,500 in total employment (24% or 1.1% pa) which was a marginally higher rate of growth than that seen in Eastern Dorset (20% or 0.9% pa representing a gain of 47,500 in total employment). Similarly, in terms of full time equivalents, Western Dorset saw an increase of about 12,000 (22% or 1.0% pa) compared with 37,500 in Eastern Dorset (18% or 0.8% pa).

4.45 Over 2013-2033 in the Dorset LEP area, the **Trend** scenario indicates expected growth in the number of FTEs of 31,200 which equates to about 0.5% per annum growth in FTE employment – compared with about 0.6% pa nationally. In this twenty year period, GVA growth of 2.1% per annum is expected locally – compared with just under 2.0% pa nationally.

FTE change	1993-2013			2013-2033		
	Number	% change overall	% change pa	Number	% change overall	% change pa
Western Dorset	12,200	22%	1.0%	5,300	9%	0.4%
Eastern Dorset	37,400	18%	0.8%	25,900	11%	0.5%
Dorset LEP area	49,600	19%	0.9%	31,200		0.5%

Table 4.3

4.46 Using the Trend scenario to look at full time equivalent growth in the **Dorset LEP area**, the most significant growth will be in Construction with further significant growth in Business/ professional services; Accommodation & food services; Financial & insurance; Residential & social care; and Health – all with growth of more than 2,000 FTEs over the period.

4.47 This pattern of job creation is echoed in the Eastern Dorset area, but is slightly different in Western Dorset where the Financial & Insurance sector is of less significance.

4.48 In the Dorset LEP area as a whole, FTE shrinkage is most likely to occur in Wholesale & Retail with further significant losses in Education and Manufacturing. These three sectors are the most significant in both Eastern and Western Dorset.

DLEP area: FTE employment by industry (000s)	Average growth 2013-23	Average growth 2023-33	Average growth 2013-33	Annual av growth 2013-23	Annual av growth 2023-33	Annual av growth 2013-33
All inds	**17.604**	**13.591**	**31.196**	**0.6%**	**0.4%**	**0.5%**
Construction	10.732	6.056	16.788	3.4%	1.5%	2.4%
Business/prof servs	4.969	1.909	6.878	1.7%	0.6%	1.1%
Accommodation & food servs	3.674	1.904	5.578	2.0%	0.9%	1.5%
Financial & insurance	1.250	2.235	3.485	0.7%	1.1%	0.9%
Residential & social	0.800	2.659	3.459	0.4%	1.3%	0.9%
Health	0.892	1.347	2.239	0.5%	0.7%	0.6%
Arts & recreation	1.236	0.060	1.296	1.6%	0.1%	0.8%
Media & IT	0.312	0.211	0.524	0.4%	0.2%	0.3%
Utilities	0.329	0.171	0.500	1.1%	0.5%	0.8%
Other services	-0.068	0.523	0.455	-0.1%	0.6%	0.2%
Public Administration & Defence	0.687	-0.295	0.392	0.4%	-0.2%	0.1%
Agriculture forestry & fishing	0.521	-0.465	0.056	1.3%	-1.1%	0.1%
Real Estate	0.656	-0.730	-0.074	0.8%	-0.9%	0.0%
Transport, storage, postal	-0.133	-0.178	-0.311	-0.1%	-0.2%	-0.1%
Mining & quarrying	-0.305	-0.089	-0.394	-7.2%	-3.8%	-5.5%
Manufacturing	-0.532	-1.179	-1.712	-0.2%	-0.4%	-0.3%
Education	-3.241	0.771	-2.469	-1.4%	0.3%	-0.5%
Wholesale & retail	-4.175	-1.318	-5.493	-1.0%	-0.3%	-0.6%

Table 4.4

Eastern Dorset: FTE employment by industry (000s)	Average growth 2013-23	Average growth 2023-33	Average growth 2013-33	Annual av growth 2013-23	Annual av growth 2023-33	Annual av growth 2013-33
All inds	**14.347**	**11.517**	**25.865**	**0.6%**	**0.5%**	**0.5%**
Construction	8.318	4.739	13.056	3.4%	1.5%	2.5%
Business/prof servs	4.031	1.505	5.536	1.6%	0.5%	1.1%
Accommodation & food servs	2.520	1.332	3.853	1.9%	0.9%	1.4%
Financial & insurance	1.219	2.170	3.389	0.7%	1.1%	0.9%
Residential & social	0.851	2.347	3.198	0.6%	1.5%	1.0%
Health	0.633	1.035	1.668	0.4%	0.7%	0.6%
Arts & recreation	0.960	0.046	1.006	1.6%	0.1%	0.8%
Media & IT	0.333	0.226	0.559	0.4%	0.3%	0.4%
Agriculture forestry & fishing	0.718	-0.271	0.447	3.5%	-1.1%	1.1%
Other services	-0.063	0.429	0.366	-0.1%	0.6%	0.2%
Utilities	0.236	0.113	0.349	1.0%	0.5%	0.8%
Public Administration & Defence	0.477	-0.203	0.274	0.4%	-0.2%	0.1%
Real Estate	0.515	-0.570	-0.055	0.8%	-0.9%	0.0%
Transport, storage, postal	-0.132	-0.169	-0.301	-0.1%	-0.2%	-0.2%
Mining & quarrying	-0.263	-0.067	-0.330	-8.4%	-4.4%	-6.4%
Manufacturing	-0.313	-0.713	-1.025	-0.1%	-0.3%	-0.2%
Education	-2.571	0.625	-1.947	-1.4%	0.4%	-0.5%
Wholesale & retail	-3.121	-1.057	-4.178	-0.9%	-0.3%	-0.6%

Table 4.5

Western Dorset: FTE employment by industry (000s)	Average growth 2013-23	Average growth 2023-33	Average growth 2013-33	Annual av growth 2013-23	Annual av growth 2023-33	Annual av growth 2013-33
All inds	**3.257**	**2.074**	**5.331**	**0.5%**	**0.3%**	**0.4%**
Construction	2.414	1.318	3.732	3.4%	1.4%	2.4%
Accommodation & food servs	1.153	0.572	1.725	2.4%	1.0%	1.7%
Business/prof servs	0.939	0.403	1.342	1.7%	0.7%	1.2%
Health	0.259	0.312	0.571	0.5%	0.6%	0.6%
Arts & recreation	0.276	0.014	0.290	1.7%	0.1%	0.9%
Residential & social	-0.051	0.312	0.261	-0.1%	0.7%	0.3%
Utilities	0.093	0.058	0.150	1.4%	0.8%	1.1%
Public Administration & Defence	0.211	-0.093	0.118	0.4%	-0.2%	0.1%
Financial & insurance	0.031	0.065	0.096	0.2%	0.5%	0.4%
Other services	-0.005	0.094	0.089	0.0%	0.6%	0.3%
Transport, storage, postal	-0.001	-0.010	-0.010	0.0%	0.0%	0.0%
Real Estate	0.141	-0.160	-0.019	0.9%	-1.0%	-0.1%
Media & IT	-0.020	-0.015	-0.035	-0.2%	-0.2%	-0.2%
Mining & quarrying	-0.042	-0.022	-0.064	-3.7%	-2.7%	-3.2%
Agriculture forestry & fishing	-0.197	-0.194	-0.391	-1.0%	-1.1%	-1.0%
Education	-0.669	0.147	-0.523	-1.3%	0.3%	-0.5%
Manufacturing	-0.220	-0.467	-0.686	-0.4%	-0.9%	-0.6%
Wholesale & retail	-1.054	-0.261	-1.315	-1.2%	-0.3%	-0.7%

Table 4.6

SUMMARY

4.49 Dorset has above average levels of economic activity and employment and below average unemployment compared to national averages. However, our representation of residents in high skill level occupations is below average and workplace based earnings are low.

4.50 Representation of employment is high in accommodation & food service activities; arts & leisure – with both these sectors resulting in high representation in tourism/leisure as a whole; health & care; and construction in both Western and Eastern Dorset. In addition, Eastern Dorset has above average representation in manufacturing – particularly advanced engineering/manufacturing; distribution; and finance & insurance. Western Dorset has above average representation in agriculture, fishing & forestry; and education.

4.51 Employment representation is low in information & communication; transport & storage; professional, scientific & technical activities; and business services (other than real estate).

4.52 These figures suggest that Dorset needs to improve the sector mix in its economy to be able to offer more highly skilled, better paid jobs. A significant socio-economic issue for the Dorset LEP area – and Western Dorset in particular – is the projected decline in the number of 16-64 year olds. Dorset needs to be able to provide sufficient good quality jobs to attract young people to work here and to encourage our own residents to stay here. We also need to ensure the workforce has the right skills to take good quality jobs and to offer a good labour pool to high value added employers. The affordability and availability of suitable housing also needs to be considered if the economy is to grow significantly.

5 Employment Land Demand Projections

5.1 The Workspace Strategy considers four employment land growth scenarios which have been established with the Bournemouth, Dorset and Poole local authorities and which consider the impact of housing growth combined with employment projections from the Cambridge Econometrics Local Economy Forecasting Model (LEFM). The scenarios considered as part of this study area as follows:

1. **Trend Scenario:** based on historic growth trends in employment;
2. **Planned Growth Scenario:** based on current local plan housing growth;
3. **Accelerated Growth Scenario:** based on housing growth in current and revised local plans plus average objectively assessed needs;
4. **Step Change Scenario:** based on housing growth in current and revised local plans plus full objectively assessed housing needs.

5.2 The projections derived from each of these scenarios uses different assumptions and they result in a wide range of projected employment land requirements (from 170.5 ha to 279.1 ha, including 10% and 20% flexibility scenarios over and above the baseline projections).

5.3 The methodology for assessing employment land demand is set out below.

METHODOLOGY FOR ESTIMATING EMPLOYMENT LAND

Time Horizon

5.4 This study looks at the projected requirement for employment land over the time horizon 2013-2033. This time horizon is consistent with the period used for the 2014 and 2015 SHMAs for Western and Eastern Dorset and is also broadly in line with the Local Plan periods of the Bournemouth, Dorset and Poole local authorities.

Geographies

5.5 The study area includes Dorset County and the two unitary authorities of Bournemouth and Poole and the six district authorities. For the purposes of the Workspace Strategy employment land projections have been produced for Bournemouth, Dorset and Poole (Dorset LEP area) and for the Eastern Dorset and Western Dorset HMAs (as functional economic areas). This geographical approach provides consistency with the Eastern and Western Dorset SHMAs and enables alignment between employment land projections and objectively assessed needs (OAN) for housing.

Eastern and Western Dorset SHMA Methodologies

5.6 Employment projection scenarios included in this report include the testing of objectively assessed housing needs from the Eastern and Western Dorset SHMAs (2015 / 2014). The methodological approaches for the preparation of the Eastern and Western Dorset SHMAs included some differences and a brief summary of the respective approaches is set out below.

5.7 **Weymouth and Portland and West Dorset Councils SHMA (2014)**

5.8 The whole market housing need figure was established by looking at demographic projections. As required by the NPPF and Planning Guidance, these demographic projections were tested against 'market signals' before establishing the housing need figure for the HMA.

5.9 The starting point for establishing the Objectively Assessed Need (OAN) in the Western Dorset HMA was the latest (2012 based) ONS sub-national population projections. These were adjusted upward to allow for past pre-recession migration rates and converted to a dwellings estimate through the application of past household formation rates and allowing for second/vacant homes.

5.10 The resultant adjusted household projections were converted to labour force projections to see what the impact of the levels of housing growth would have on labour force over the plan period. These labour force projections were tested against projected job growth across the HMA to ensure that the level of housing provision was not restricting local economic growth.

5.11 **Eastern Dorset SHMA (2015)**

5.12 The Eastern Dorset SHMA assessed the objectively assessed housing needs for the HMA through examining demographic and household projections which is consistent with the guidance set out in the NPPF and and PPG. The demographic led projections are based on the 2012 sub national population projections (SNPP) issued by the ONS in March 2014 and the associated Household Projections published by the CLG in February 2015 (the demographic projections cover the period 2013 to 2033).

5.13 The Eastern Dorset SHMA has also sought to consider if higher housing provision is needed (relative to the demographic led projections) to support growth in employment. The SHMA considers two economic growth scenarios:

- A baseline employment growth forecast from Cambridge Econometrics; and
- A local Knowledge Economic Growth Scenario developed by Dorset County Council in conjunction with the Eastern Dorset local authorities to provide a more realistic and informed assessment of potential economic growth in each area, and incorporates the implications of the Dorset LEP Strategic Economic Plan.

5.14 The PPG provides further guidance regarding the adoption of appropriate scenarios for establishing OAN housing need based on household formation and supporting local economic growth. Government policy advises against using an economic led scenario where this would result in a lower level of housing provision in comparison to a demographic led projection. However, if a local economic growth scenario results in a higher OAN than the demographic projections it may be appropriate to adopt this scenario in order to support local economic growth. Therefore, in Eastern Dorset some authorities are taking forward demographic led projections and others are taking forward economic led projections from the SHMA as appropriate.

Employment land and land use classes

5.15 The focus of the Workspace Strategy is employment land defined as:

- Office (B1a),
- Research and Development (B1b),
- Light Industry (B1c),
- General Industry (B2) and,
- Warehouses (B8).

5.16 These are grouped in three land use classes (LUC) for consistency in the calculations:

- Office (B1a, B1b).
- Other business space (B1c, B2).
- Warehousing (B8).

5.17 Other business and Warehousing are then grouped together as 'Industrial'.

5.18 There is also a significant amount of employment in sectors which do not take up B-use class workspace, for example the retail sector, education, health & social work. These sectors are referred to collectively as 'non B-use'.

5.19 The demand for employment land for non B-use employment growth will have a spatial implication but this is not included in this study. The reasons for this are two-fold.

- Firstly, there is currently no established methodology for determining the land requirements for non-B uses.
- Secondly, most B-uses have quite specific land requirements and often developments have issues relating to amenity, impact and access which can be achieved and managed through business park locations. There are also more constraints for B-uses regarding where they can locate as they are not always welcome or appropriate neighbours to other uses. An industrial estate location is therefore often

needed meaning that B uses can be less flexible. Whilst some non-B uses may also be subject to restrictions or policy restraints, mostly there are no such issues and they can be located in a number of different locations subject to the usual planning considerations.

Methodology

5.20 The employment land demand is based on three main elements:

1. **Economic growth scenarios:** how will changes in the volume and pattern of employment affect the demand for employment land?

2. **Allowance for windfall losses:** based on historic trends, how much employment land might be lost to 'non B' class uses?

3. **Allowance for churn:** how much employment land might be needed to facilitate redevelopment and relocation?

5.21 Further to these, an allowance for flexibility is made at 10% and 20% above the baseline.

A: Projections for employment growth 2013-2033 give employment demand

5.22 At national and regional level, forecasts of future growth are made and these are used together with historic trend data to generate projections by industrial sector and sub-regional economy. Economic and employment projections at sub-regional level are a more mechanical process than the higher level forecasts.

5.23 The 2012 Workspace Study was based on a set of projections for Bournemouth, Dorset and Poole prepared by Experian for the South West Observatory (SWO) and made available to the Local Information Network of local authorities co-ordinated by them. The 2016 Workspace Strategy is based on the Local Economy Forecast Model (LEFM) for Dorset, which is produced by Cambridge Econometrics and includes district and borough projections. For the purposes of this study employment land projections are set out by HMA as these areas constitute the functional economic areas within the Dorset LEP area and it is appropriate to undertake strategic planning at this spatial scale. The projections are a best estimate of what the future might bring based on conditions at the time of formulating them. As such, there is always uncertainty about future economic conditions but the aim is to give an indication of the amount of employment land that will be required. A number of scenarios have been developed by the local authorities of Bournemouth, Dorset and Poole to test potential land requirements.

5.24 Reporting is for:

- Expansion demand (i.e. new jobs created) – underlying this, replacement demand will continue to generate job opportunities through the need to replace those workers who leave the workforce for retirement, ill health etc. With our ageing workforce population, this is a potential challenge to businesses in terms of succession planning.
- Full time equivalent (FTE) employment rather than total employment.
- Gross value added (GVA) in 2008 values i.e. excluding effects of inflation.

5.25 **The Trend Scenario** – this scenario re-based the default LEFM figures for each district to the 2011 workplace based population by industry as a starting point. Growth rates from the LEFM model were then applied (without adjustment so remaining in line with projected trends by sector). However, further adjustments for known local developments and change were made up to 2013 in consultation with the BDP local authorities.

5.26 Over 2013-2033 for the **Dorset LEP** area, the **Trend** scenario indicates:

- Growth in the number of FTEs of 31,200 – of which 17,700 are likely to be B1-B8;
- This is 0.5% per annum growth in FTE employment – compared with about 0.6% pa nationally;
- GVA growth of 2.2% per annum – compared with just under 2.0% pa nationally;
- An employment land requirement of 170.5ha (with no allowance for flexibility), or up to 190.5ha with 20% flexibility.

Trend scenario			
2013-33	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**
FTE growth (000s)	25.9	5.3	31.2
FTE change pa	0.5%	0.4%	0.5%
B1-B8 FTEs inc above (000s)	*15.0*	*2.7*	*17.7*
B1-B8 FTE change pa	*0.6%*	*0.5%*	*0.6%*
GVA growth (£m 2008)	5,651.3	1,341.6	6,992.9
GVA change pa	2.2%	2.1%	2.2%
Housing growth	*na*	*na*	*na*
Baseline B use land requirement (ha)	89.1	10.9	100.1
Total B use land requirement (ha)	140.7	29.8	170.5
Total B use land requirement (ha) with 10% flexibility	149.6	30.9	180.5
Total B use land requirement (ha) with 20% flexibility	158.5	32.0	190.5

Table 5.1

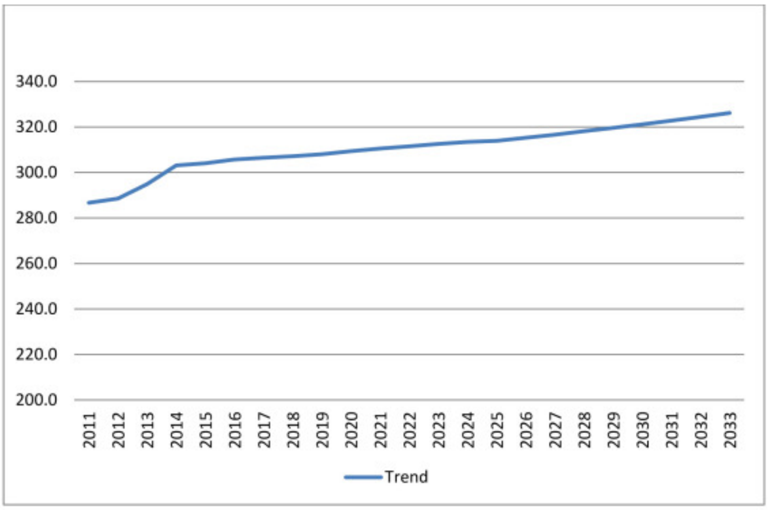

Figure 5.1 FTE employment 000s: Dorset LEP

The Planned Growth Scenario – based on housing growth

5.27 The baseline is again the 2011 Census of Population workplace based employment data by district/unitary authority and by industrial sector.

5.28 Data based on local plan housing growth figures (as of June 2016) is then used as a base for projection.

- This housing growth incorporates current adopted local plan housing trajectories until the end of the respective authorities plan periods.
- As plan periods vary – and none extends to 2033 – then beyond the end of the plan periods the **average** objectively assessed needs (OAN) are applied to 2033 using data from the Eastern and Western Dorset SHMAs.
- There are 64,580 proposed dwellings across the LEP area over 2013-2033.
- Dwellings are converted to households using an average dwellings to households ratio from the Eastern and Western Dorset SHMAs;
- Households are converted to potential total employment demand using an average households to employment ratio from the Eastern and Western Dorset SHMAs;
- Total employment is converted to full time equivalent (FTE) employment using an all industry ratio.

5.29 Over 2013-2033 in the **Dorset LEP** area, the **Planned Growth** housing scenario indicates:

- Growth in the number of FTEs of 40,800 – of which 22,000 are likely to be B1-B8;
- This is 0.65% per annum growth in FTE employment;

- GVA growth of 2.3% per annum;
- An employment land requirement of 222.4ha (with no allowance for flexibility), or up to 252.8ha with 20% flexibility.

Planned growth scenario			
2013-33	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**
FTE growth (000s)	30.9	10.0	40.8
FTE change pa	0.6%	0.7%	0.6%
B1-B8 FTEs inc above (000s)	*17.4*	*4.6*	*22.0*
B1-B8 FTE change pa	*0.7%*	*0.8%*	*0.8%*
GVA growth (£m 2008)	5,967.6	1,609.4	7,577.0
GVA change pa	2.3%	2.4%	2.3%
Housing growth	*48,818*	*15,756*	*64,574*
Baseline B use land requirement (ha)	121.1	30.8	152.0
Total B use land requirement (ha)	172.7	49.7	222.4
Total B use land requirement (ha) with 10% flexibility	184.8	52.8	237.6
Total B use land requirement (ha) with 20% flexibility	196.9	55.9	252.8

Table 5.2

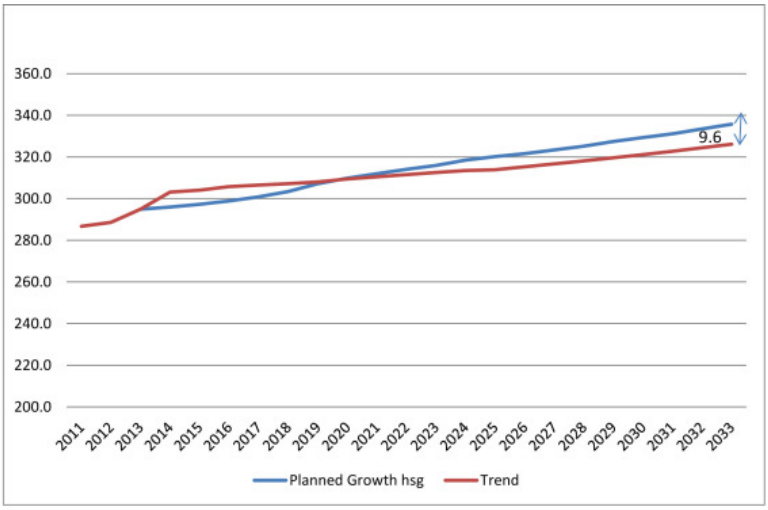

Figure 5.2 FTE employment 000s: Dorset LEP

Accelerated Growth Scenario

5.30 The baseline remains the 2011 Census of Population workplace based employment data by district/unitary authority, by industrial sector.

5.31 Employment projections are based on housing growth projected in existing local plans and revised local plans in Eastern and Western Dorset.

- Revised plans are anticipated to be in place by April 2019 in Bournemouth, Christchurch, East Dorset and by 2018 in Purbeck, Poole and North Dorset.
- Existing local plan figures are applied up to the point when revised plans are in place.
- From this point onwards until 2033 the average objectively assessed needs of the Eastern and Western Dorset SHMAs are applied.
- There are 69,200 proposed dwellings across the LEP area over 2013-2033.
- Dwellings are converted to households using an average dwellings to households ratio from the Eastern and Western Dorset SHMAs;
- Households are converted to potential total employment demand using an average households to employment ratio from the Eastern and Western Dorset SHMAs;
- Total employment is converted to full time equivalent (FTE) employment using an all industry ratio.

5.32 Over 2013-2033 in the **Dorset LEP** area, the **Accelerated Growth** housing scenario indicates:

- Growth in the number of FTEs of 43,800 – of which 23,500 are likely to be B1-B8;
- This is 0.7% per annum growth in FTE employment;
- GVA growth of 2.4% per annum;
- An employment land requirement of 233.9ha (with no allowance for flexibility), or up to 266.6ha with 20% flexibility.

Accelerated growth scenario			
2013-33	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**
FTE growth (000s)	33.7	10.1	43.8
FTE change pa	0.7%	0.8%	0.7%
B1-B8 FTEs inc above (000s)	*18.8*	*4.7*	*23.5*
B1-B8 FTE change pa	*0.8%*	*0.8%*	*0.8%*
GVA growth (£m 2008)	6,149.0	1,615.9	7,764.9
GVA change pa	2.3%	2.5%	2.4%
Housing growth	*53,269*	*15,935*	*69,204*
Baseline B use land requirement (ha)	132.1	31.3	163.4
Total B use land requirement (ha)	183.7	50.2	233.9
Total B use land requirement (ha) with 10% flexibility	196.9	53.3	250.2
Total B use land requirement (ha) with 20% flexibility	210.1	56.4	266.6

Table 5.3

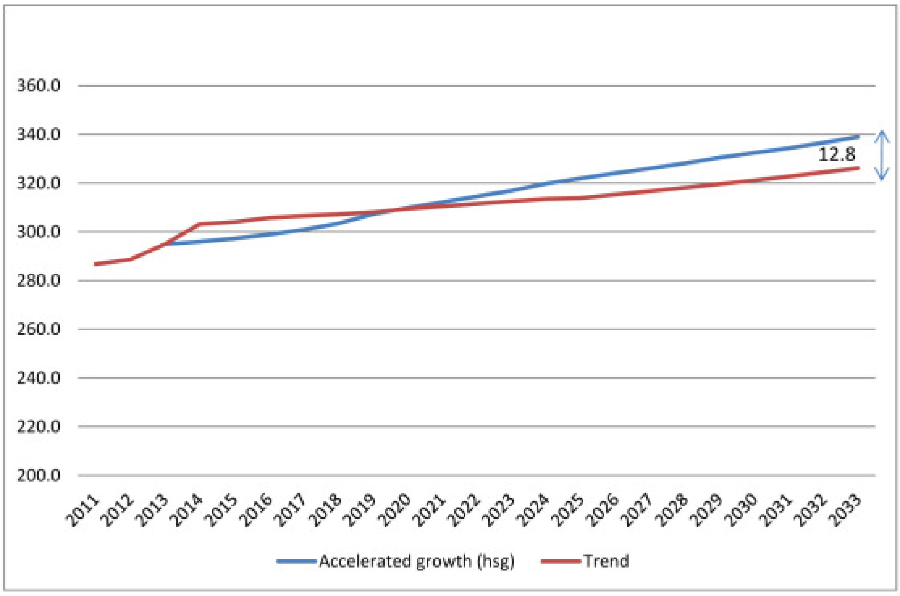

Figure 5.3 FTE employment 000s: Dorset LEP

Step Change Scenario

5.33 The baseline is the 2011 Census of Population workplace based employment data by district/unitary authority, by industrial sector.

5.34 Employment projections are based on housing growth projected in existing local plans and revised local plans in Eastern and Western Dorset.

- Revised plans are anticipated to be in place by April 2019 in Bournemouth, Christchurch, East Dorset and by 2018 in Purbeck, Poole and North Dorset.
- Existing Local Plan figures are applied up to the point when revised plans are in place.
- From this point onwards until 2033 the full objectively assessed needs of the Eastern and Western Dorset SHMAs are applied.
- There are 73,360 proposed dwellings across the LEP area over 2013-2033;
- Dwellings are converted to households using an average dwellings to households ratio from the Eastern and Western Dorset SHMAs;
- Households are converted to potential total employment demand using an average households to employment ratio from the Eastern and Western Dorset SHMAs;
- Total employment is converted to full time equivalent (FTE) employment using an all industry ratio.

5.35 Over 2013-2033 in the **Dorset LEP** area, the **Step Change** housing scenario indicates:

- Growth in the number of FTEs of 46,500 – of which 24,800 are likely to be B1-B8;
- This is 0.7% per annum growth in FTE employment;
- GVA growth of 2.4% per annum;
- An employment land requirement of 244.3ha (with no allowance for flexibility), or up to 279.1ha with 20% flexibility.

Step change scenario			
2013-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area
FTE growth (000s)	36.4	10.1	46.5
FTE change pa	0.7%	0.8%	0.7%
B1-B8 FTEs inc above (000s)	*20.1*	*4.7*	*24.8*
B1-B8 FTE change pa	*0.8%*	*0.8%*	*0.8%*
GVA growth (£m 2008)	6,318.3	1,615.9	7,934.3
GVA change pa	2.4%	2.5%	2.4%
Housing growth	*57,427*	*15,935*	*73,362*
Baseline B use land requirement (ha)	142.6	31.3	173.9
Total B use land requirement (ha)	194.1	50.2	244.3
Total B use land requirement (ha) with 10% flexibility	208.4	53.3	261.7
Total B use land requirement (ha) with 20% flexibility	222.7	56.4	279.1

Table 5.4

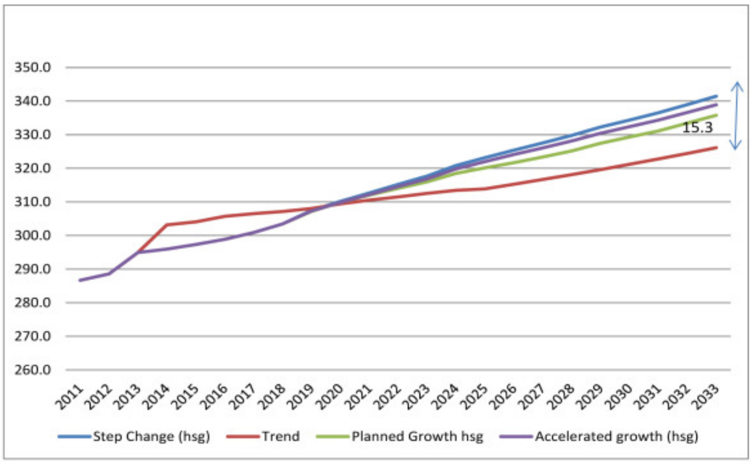

Figure 5.4 FTE employment 000s: Dorset LEP

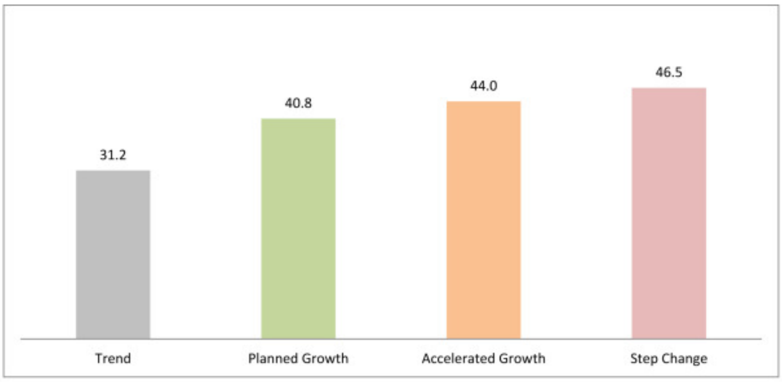

Figure 5.5 Dorset LEP area: FTE change 000s 2013-2033

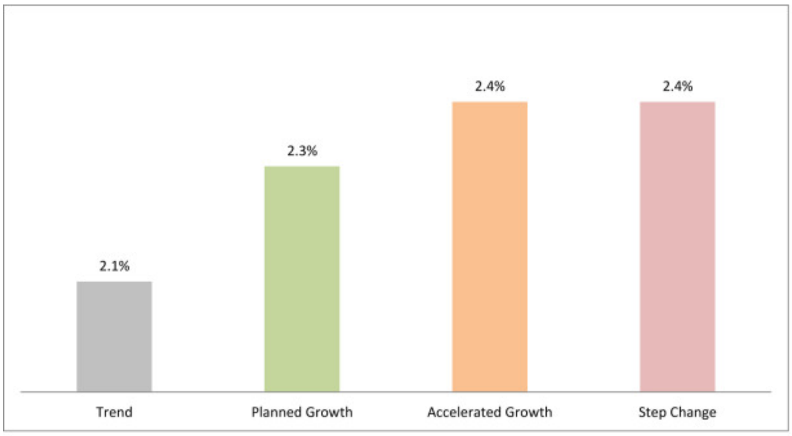

Figure 5.6 Dorset LEP area: GVA % growth pa 000s 2013-2033

Employment demand by phased years: Trend scenario			
Scenario:	**TREND**	**TREND**	**TREND**
Area:	**UK**	**South West**	**Dorset LEP area**
2013-33	*FTE growth of 0.6% per annum led by Business support services but with significant FTE creation also in Food and Beverage Services; Construction; Residential and Social.*	*FTE growth of 0.6% per annum led by Construction but with significant FTE creation also in Food & Beverage Services; Residential & Social; Health; Business Support Services.*	*FTE growth of 0.5% per annum (31,200) led by Construction but with significant FTE creation also in Business Support Services; Food & Beverage Services; Financial & Insurance; Residential & Social; Other Manufacturing & Repair. More than half of overall FTE growth is expected to be in B1-B8 uses (57%) and this employment type sees a marginally higher rate of growth overall.*
2013-18	About 52% of FTE growth is expected in this period, led by Business Support Services; Construction; Architectural & engineering service; Food & beverage services; Head offices & management consultancies.	About 40% of FTE growth is expected in this period, led by Construction; Food & Beverage Services; Business Support Services; Agriculture, Forestry & Fishing; Accommodation.	FTE growth of 12,200 led by Construction but with significant FTE creation also in Business Support Services; Food & Beverage Services; Accommodation.
2018-23	About 18% of FTE growth is expected in this period, led by Construction; Food & Beverage Services and Residential & Social.	FTE growth largely in Construction; Residential & Social; Food & Beverage Services.	FTE growth of 5,400 largely in Construction.
2023-28	FTE growth largely in Food & Beverage Services.	About 18% of FTE growth is expected in this period, led by Construction and Food & Beverage Services.	FTE growth of 5,600 led by Construction but with significant FTE creation also in Residential & Social; Financial & Insurance.
2028-33	About 16% of FTE growth is expected in this period, led by Food & Beverage Services.	About 21% of FTE growth is expected in this period, led by Construction but with significant FTE creation also in Food & Beverage Services.	FTE growth of 8,000 led by Construction but with significant FTE creation also in Residential & Social; Financial & Insurance; Other Manufacturing & Repair.

Table 5.5 Source: Local Economy Forecasting Model for Dorset, Cambridge Econometrics and Dorset County Council

Employment demand by phased years: Other Dorset scenarios			
Scenario:	**PLANNED GROWTH**	**ACCELERATED GROWTH**	**STEP CHANGE**
Area:	**Dorset LEP area**	**Dorset LEP area**	**Dorset LEP area**
2013-33	*FTE growth of 0.7% (40,800) led by Construction but with significant FTE creation also in Business Support Services; Food & Beverage Services; Financial & Insurance; and Residential & Social. More than half of overall FTE growth is expected to be in B1-B8 uses (54%) and this employment type sees a marginally higher rate of growth overall.*	*FTE growth of 0.7% (43,800) led by Construction but with significant FTE creation also in Business Support Services; Food & Beverage Services; Financial & Insurance; Residential and Social. More than half of overall FTE growth is expected to be in B1-B8 uses (54%) and this employment type sees a marginally higher rate of growth overall.*	*FTE growth of 0.7% (46,500) led by Construction but with significant FTE creation in Business Support Services; Food & Beverage Services; Financial & Insurance; Residential & Social. More than half of overall FTE growth is expected to be in B1-B8 uses (53%) and this employment type sees a marginally higher rate of growth overall.*
2013-18	FTE growth of 8,500 led by Construction; Business Support Services; Food & Beverage Services; Accommodation.	FTE growth of 8,500 led by Construction; Business Support Services; Food & Beverage Services; Accommodation.	FTE growth of 8,500 led by Construction; Business Support Services; Food & Beverage Services; Accommodation.
2018-23	FTE growth of 12,600 largely in Construction.	FTE growth of 13,300 largely in Construction.	FTE growth of 14,200 largely in Construction.
2023-28	FTE growth of 9,200 led by Construction, with significant FTE creation in Residential & Social; Financial & Insurance; Food & Beverage Services.	FTE growth of 11,300 led by Construction, with significant FTE in Financial & Insurance; Residential & Social; Food & Beverage Services; Health; Other manufacturing & repair.	FTE growth of 12,100 led by Construction, with significant FTE in Financial & Insurance; Residential & Social; Food & Beverage Services; Health; Other Manufacturing & Repair; Business Support Services.
2028-33	FTE growth of 10,600 led by Construction but with significant FTE in Residential & Social; Financial & Insurance; Other manufacturing & repair; Food & Beverage Services.	FTE growth of 10,800 led by Construction but with significant FTE in Residential & Social; Financial & Insurance; Other manufacturing & Repair; Food & Beverage Services.	FTE growth of 11,700 led by Construction but with significant FTE in Residential & Social; Financial & Insurance; Other Manufacturing & Repair; Food & Beverage Services.

Table 5.6 Source: Local Economy Forecasting Model for Dorset, Cambridge Econometrics and Dorset County Council

B: Employment demand is allocated to Land Use Class (Office, Other business, Warehousing)

5.36 The employment projections provide a level of full time equivalent employment in 14 industrial sectors projected over the twenty year period, 2013-33.

5.37 Converting the employment changes in each economic sector (by standard industrial classification – SIC) into land use classes (LUC) is the first step for the employment land demand forecast. This gives the change in labour demand on B use land.

5.38 In the 2012 Workspace Study update, a revised matrix, similar to that used by GVA Grimley in the 2008 Workspace Strategy, was used. The original matrix was based on the ODPM Employment Land Review Guidance. The revised matrix correlates the original 2003 Standard Industrial Classification (SIC) codes to SIC 2007. However, the ODPM Employment Land Review Guidance 2004 referred to has since been withdrawn and a range of matrices have been used by different consultants to convert SIC to LUC. A revised and simplified matrix was therefore consulted on and agreed by Dorset LEP area local authority officers:

LEFM sector	non B	Office	Other business (industry)	Warehouse	*Total B1-B8 emp*
Agric forestry fishing	100%				*0%*
Extraction	100%				*0%*
Manufacturing			100%		*100%*
Utilities	100%				*0%*
Construction	44%		56%		*56%*
Distribution	81%	1%	0%	18%	*19%*
Hotels & catering	100%				*0%*
Transport & comms	66%			34%	*34%*
Financial services		100%			*100%*
Business services	4%	84%	12%		*96%*
Public ad & def	10%	70%	10%	10%	*90%*
Education	100%				*0%*
Health & social	90%	10%			*10%*
Other services	86%	14%			*14%*

Table 5.7

C: Employment demand is converted to floorspace requirement using worker densities by LUC (FTE per sqm)

5.39 Having allocated employment change in each of the 14 sectors to a 'typical' employment land use class (office, other business use and warehousing), the 'Employment Density Guide' 2015[14] giving **worker density** (square metres per full-time equivalent (FTE) workers) was used to translate the additional number of employees to **a floorspace requirement**. The guide provides up to date densities for all use classes within A (Retail), B (industrial, office, warehouses and distribution), C (hotels) and D (visitor attractions).

5.40 For Office use, an average of 11 sqm/FTE has been used: this averages the six types of office use specified, ranging from 8 sqm/FTE in call centres to 13 sqm/FTE for corporate offices. This is slightly lower than the estimate used previously (12 sqm/FTE) and means less space is required per FTE, reflecting changing trends to make office space more intensively used.

5.41 Employment densities for B2 Industrial & Manufacturing (36 sqm/FTE) and B8 Storage & Distribution – 'final mile' distribution centre – (70 sqm/FTE) have been used as the average for other/industrial and warehousing across Dorset. These are consistent with the densities used in the last study.

Land use	Employment Density Guide 2015	Employment Densities Guide 2010	*Employment Densities Guide 2001*
	Sqm per FTE	Sqm per FTE	*Sqm^2 per FTE*
Office	**11**	12	*19*
Other business space	**36**	36	*34*
Warehousing	**70**	70	*50*

Table 5.8 Comparison of worker densities (Sources: HCA and Drivers Jonas Deloitte)

D: Floorspace requirement is converted to a baseline land requirement (ha) using plot ratios by LUC

5.42 The floorspace required is translated to hectares using **plot ratios**[15] for each B use. Plot ratio information has been calculated for office, industry, warehouse, mixed, total (all uses) and industry and warehousing for each local authority using employment land completions between 1 April 1994 and 31 March 2015 together with outstanding commitments (under construction, unimplemented applications and outstanding land allocations) as at 1 April 2015. Appendix F shows plot ratios for each district.

14 'Employment Density Guide' 3rd edition 2015, Homes and Communities Agency (HCA), November 2015

15 Plot ratios 1994 to 2014, Dorset authorities, January 2016

5.43 From this, a **baseline land requirement**, in hectares, for the period 2013-2033 is provided. In addition, the total figure has been split into the three B land use classes: office, other business space and warehouses.

5.44 To the baseline requirement, two **allowances** are then applied: the allowance for windfall losses and the allowance for churn. The final figures for employment land take account of these allowances.

E: An allowance for windfall losses is applied

5.45 The allowance for windfall losses takes into account the expectation that a proportion of designated employment land may not be used entirely for B use class employment and this creates a replacement demand. Land uses such as recycling, waste management, combined heat and power plants and bus depots can, under certain circumstances and where appropriate, be developed on employment land. Employment land can also be lost to residential use.

5.46 A significant part of the projected employment growth arises from sectors which have traditionally not been located on employment land such as health care, education, hotels and leisure. Recent planning experience has shown that under specific circumstances, and where appropriate, such uses might locate on employment land. However this has to be monitored carefully to ensure there remains sufficient available land for B use employment on employment land. In some circumstances the development of non-B uses might be a catalyst for employment development to come forward.

5.47 The allowance for windfall losses has been calculated using historic employment land loss data over the last eleven years and median loss is used. The median figure is used as this is more likely to eliminate extremes which may skew the mean and should therefore give a more moderate and even result.

5.48 It should be noted that the windfall allowance is based solely on historic employment land losses[16] and there is no margin included to cover any future change of policy regarding employment land use.

5.49 It should also be noted that whilst most local authorities include both change to residential use and change to non-B use in their historic employment land loss data, this is not the case for **West Dorset** or **Weymouth & Portland** where only losses to residential use are included. Losses are not limited to allocated and established employment sites, but include loss of any premises that previously had a B class use. This relates to the windfall figure for the Western Dorset area.

16 Note: There are differences in the way employment land losses are monitored by local authority. Where policy requires, losses from non-allocated sites are included as these would need to be replaced and therefore need to be accounted for in windfall losses.

5.50 Over 2013-33, a windfall allowance totalling 35ha has been calculated for the Dorset LEP area. This compares with:

- 2012 Workspace Study: 50ha over 2011-31
- 2008 Workspace Strategy: 79ha over 2006-26

F: An allowance for churn is applied

5.51 The location and premises needs of businesses change over time and sometimes this will result in the business moving away. In other circumstances, an existing business might cease its operations and a new business could take over a site for redevelopment. For this to happen smoothly, there is a need for a certain level of vacant land. This type of demand has been called ‘churn’ demand or ‘frictional vacancy’.

5.52 Typically, it is estimated to take around two years to achieve a planning consent, undertake the site preparation and construct the development after a site has changed hands. Therefore, to estimate the churn demand for each area the annual average net take-up of employment land for the period 2004 to 2014 has been multiplied by two[17].

5.53 Over 2013-33, a churn allowance totalling 35ha has been calculated for the Dorset LEP area. This compares with:

- 2012 Workspace Study: 29ha over 2011-31
- 2008 Workspace Strategy: 35ha over 2006-26

G: Adding allowances to the base projection gives the final requirement

5.54 The final requirement comprises the baseline projection plus the adjustment for allowances. This also includes the consideration of allowances for 10% and 20% flexibility over and above the baseline projection figure.

Base Results

5.55 The following table shows the base projection for each area for the Trend growth scenario before making any allowance for windfall, churn or flexibility. The figures are disaggregated by two land use classes.

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17 In the 2008 Workspace Strategy, the annual average for 2004/05 and 2005/06 was multiplied by two to give the churn allowance for 2006-2026.

Trend growth Scenario: Base projection by area, 2013-33

2013-33	Eastern Dorset HMA (Ha)	Western Dorset HMA (Ha)	Dorset LEP area (Ha)
Office baseline	32.0	2.9	34.8
Industrial baseline (other + warehousing)	57.2	8.0	65.2
Baseline B use land requirement	***89.1***	***10.9***	***100.1***

Table 5.9 Source: Dorset County Council

5.56 The increase in employment demand results in an additional demand for 100 hectares of employment land in the Dorset LEP area.

5.57 More than four-fifths (89%) of the projected increase in baseline demand for employment land is expected to take place in the Eastern Dorset area.

5.58 In terms of land use class, there is substantial growth over 2013-2033 in the industrial land requirement of 65ha – this is driven by employment growth in construction. Growth in office land requirements is lower at 35ha.

5.59 The employment land requirement in the **Planned Growth** scenario is higher, as shown in the table below.

Planned Growth Scenario: Base projection by area, 2013-33

2013-33	Eastern Dorset HMA (Ha)	Western Dorset HMA (Ha)	Dorset LEP area (Ha)
Office baseline	39.4	6.9	46.3
Industrial baseline (other + warehousing)	81.7	23.9	105.6
Baseline B use land requirement	***121.13***	***30.83***	***151.96***

Table 5.10 Source: Dorset County Council

5.60 The increase in employment demand results in an additional demand for 152 hectares of employment land in the Dorset LEP area.

5.61 Four-fifths (80%) of the projected increase in baseline demand for employment land is expected to take place in the Eastern Dorset area.

5.62 In terms of land use class, there is substantial growth over 2013-2033 in the industrial land requirement of 106ha. Growth in office land requirements is lower at 46ha.

5.63 The employment land requirement in the **Accelerated Growth** scenario is higher again, as shown in the table below.

Accelerated Growth Scenario: Base projection by area, 2013-33

2013-33	Eastern Dorset HMA (Ha)	Western Dorset HMA (Ha)	Dorset LEP area (Ha)
Office baseline	41.9	6.9	48.8
Industrial baseline (other + warehousing)	90.3	24.4	114.6
Baseline B use land requirement	***132.1***	***31.3***	***163.4***

Table 5.11 Source: Dorset County Council

5.64 The increase in employment demand results in an additional demand for 163 hectares of employment land in the Dorset LEP area.

5.65 Four-fifths (81%) of the projected increase in baseline demand for employment land is expected to take place in the Eastern Dorset area.

5.66 In terms of land use class, there is substantial growth over 2013-2033 in the industrial land requirement of 115ha. Growth in office land requirements is lower at 49ha.

5.67 The employment land requirement in the **Step Change** scenario is higher again, as shown in the following table.

Step Change Scenario: Base projection by area, 2013-33

2013-33	Eastern Dorset HMA (Ha)	Western Dorset HMA (Ha)	Dorset LEP area (Ha)
Office baseline	44.5	6.9	51.4
Industrial baseline (other + warehousing)	98.1	24.4	122.4
Baseline B use land requirement	***142.6***	***31.3***	***173.9***

Table 5.12 Source: Dorset County Council

5.68 The increase in employment demand results in an additional demand for 174 hectares of employment land in the Dorset LEP area.

5.69 Four-fifths (82%) of the projected increase in baseline demand for employment land is expected to take place in the Eastern Dorset area.

5.70 In terms of land use class, there is substantial growth over 2013-2033 in the industrial land requirement of 122ha. Growth in office land requirements is lower at 51ha.

Summary of scenarios: base projection by area, 2013-33

2013-33: housing scenarios	Eastern Dorset HMA (Ha)	Western Dorset HMA (Ha)	Dorset LEP area (Ha)
Trend	89.1	10.9	100.1
Planned Growth	121.1	30.8	152.0
Accelerated Growth	132.1	31.3	163.4
Step change	142.6	31.3	173.9

Table 5.13

Allowances

5.71 To these baseline figures, two adjustments (windfall and churn) have been made. Because of the complexity of attempting to estimate the allowances for each of the land use classes, only a single figure for each adjustment has been calculated.

Allowance for windfall losses

5.72 This is the allowance for the likelihood of a proportion of designated employment land being used for other than B use class employment, e.g. for recycling, waste management, combined heat and power plants, bus depots, health care, education, leisure use etc, or for residential use.

5.73 This alternative use of employment land needs careful monitoring to ensure there is enough available land for B use employment on employment land based on historic data. No allowance is included to cover any future change of policy regarding employment land use.

5.74 To estimate the amount of land needed to replace losses through windfall development, the level of historic loss for each area for the period 2004/05 to 2009/10 has been used as a guideline.

5.75 Table 5.8 below shows the historic losses of employment land to other uses by district over the last eleven years.

5.76 It should be noted that whilst most local authorities include both change to residential use and change to non-B use in their historic employment land loss data, this is not the case for **West Dorset** or **Weymouth & Portland** where losses only to residential use are included. These losses are not limited to allocated and established employment estates, but include losses of all premises that previously had a B class use.

	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	Total losses over 11 years	Projected loss: 20 year period
Christchurch	0.54	0.00	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.25	0.34	1.14	0.73
East Dorset	0.32	0.00	0.00	0.00	0.42	0.47	0.40	0.65	0.05	0.23	0.04	2.58	1.65
North Dorset	3.23	3.61	1.56	1.30	0.45	0.27	0.04	0.15	0.33	0.33	0.21	11.48	7.33
Purbeck	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.01	0.00	0.05	0.03
West Dorset	3.30	5.87	0.00	0.07	0.04	0.01	0.90	0.14	0.00	1.99	0.29	12.61	8.05
Weymouth & Portland	0.00	1.18	0.00	0.00	4.29	0.00	0.02	0.05	0.00	0.26	0.95	6.75	4.31
DCC Dorset	7.39	10.66	1.56	1.37	5.20	0.79	1.38	0.99	0.38	3.06	1.84	**34.61**	**22.11**
Bournemouth	1.08	0.72	2.83	1.34	0.49	0.68	0.96	1.14	1.14	1.18	1.39	12.95	8.27
Poole	0.31	0.74	0.76	0.76	1.52	0.07	0.20	0.14	0.08	2.02	1.03	7.63	4.87
Dorset LEP area	8.78	12.12	5.15	3.47	7.21	1.54	2.54	2.27	1.60	6.26	4.26	55.19	**35.26**
Eastern Dorset	5.48	5.07	5.15	3.40	2.88	1.53	1.62	2.08	1.60	4.01	3.02	35.83	22.89
Western Dorset	3.30	7.05	0.00	0.07	4.33	0.01	0.92	0.19	0.00	2.25	1.24	19.36	12.37

Table 5.14 Historic employment land losses (hectares) (Source: Dorset Local Authorities Monitoring Reports)

5.77 The median of the employment land losses across the eight districts/boroughs over the eleven historic years is 0.22 ha.

5.78 This 0.22 ha median loss has then been multiplied by eight (for the number of districts and boroughs) and then by twenty to give the expected total loss for the twenty years 2013 to 2033 (35.26 ha across the Dorset LEP area) and then apportioned to each district based on their proportion of historic losses. The figure in the final column of Table 5.8 shows the projected loss for each district. This indicates 22.9ha in the Eastern Dorset area, and 12.4 ha in the Western Dorset area.

Allowance for churn

5.79 For the property market to operate smoothly, a certain level of vacant land is required [18]. This demand for vacant land has been called demand for churn or frictional vacancy. To estimate the level of demand for churn we have referred back to historic take-up rates.

5.80 To estimate the churn demand for each area, the annual average net take-up of employment land for the period 2004/05 to 2014/15 has been multiplied by two. This is based on the assumption that it takes about two years to achieve planning consent, prepare the site and construct the development.

5.81 The final column in Table 5.9 shows the amount of churn which has been calculated for each local authority based on the two year average over eleven years resulting in a requirement for an additional 35 ha across the Dorset LEP area as a whole. This gives 28.7ha in Eastern Dorset and 6.5ha in Western Dorset.

Summary of scenarios: projection by area after allowances, 2013-33

2013-33: housing scenarios	Eastern Dorset HMA (Ha)	Western Dorset HMA (Ha)	Dorset LEP area (Ha)
Trend	140.7	29.8	170.5
Planned Growth	172.7	49.7	222.4
Accelerated Growth	183.7	50.2	233.9
Step change	194.1	50.2	244.3

Table 5.15

18 'Bournemouth Dorset Poole Workspace Strategy and Delivery Plan', October 2008, GVA Grimley Ltd, reference 07A800547

	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	Total (11 yrs)	Two year average
Christchurch	1.59	0.46	0.00	0.19	0.94	2.04	0.52	3.10	1.68	2.56	0.16	13.24	2.41
East Dorset	0.52	0.63	0.62	0.88	0.01	0.86	1.23	2.37	0.52	1.59	0.03	9.26	1.68
North Dorset	2.18	4.76	3.68	1.08	2.92	1.06	0.66	2.70	1.51	2.49	1.87	24.91	4.53
Purbeck	0.10	1.74	1.00	0.96	0.00	0.56	1.53	0.18	2.33	54.26	1.10	63.76	11.59
West Dorset	5.61	3.96	2.59	3.38	2.68	0.65	0.92	2.04	2.98	0.72	4.08	29.61	5.38
Weymouth & Portland	0.13	0.00	0.00	1.42	0.00	0.61	0.95	0.64	1.50	0.89	0.12	6.26	1.14
DCC Dorset	**10.13**	**11.55**	**7.89**	**7.91**	**6.55**	**5.78**	**5.81**	**11.03**	**10.52**	**62.51**	**7.36**	**147.04**	**26.74**
Bournemouth	1.19	0.17	2.10	2.02	1.23	1.30	1.14	8.35	0.37	0.82	0.93	19.62	3.57
Poole	6.82	2.65	1.87	8.37	3.04	1.49	0.75	0.80	0.61	0.23	0.23	26.86	4.88
Dorset sub-region	**18.14**	**14.37**	**11.86**	**18.30**	**10.82**	**8.57**	**7.70**	**20.18**	**11.50**	**63.56**	**8.52**	**193.52**	**35.19**
Eastern Dorset	12.40	10.41	9.27	13.50	8.14	7.31	5.83	17.50	7.02	61.95	4.32	157.65	28.66
Western Dorset	5.74	3.96	2.59	4.80	2.68	1.26	1.87	2.68	4.48	1.61	4.20	35.87	6.52

Table 5.16 Allowance for churn demand: employment land completions (Source: Dorset Local Authorities Monitoring Reports)

Allowance for flexibility

5.82 In this revision of the Workspace Strategy, a flexibility allowance has been added to the baseline employment land allocations for each area.

5.83 Two flexibility scenarios have been calculated: one at 10% and one at 20% of the base figure. The 10% set is given for consistency since generally this has been the figure used to provide flexibility in past employment land policies in structure and local plans. The 20% set has been prepared to show the projected land requirements should local authorities wish to give additional flexibility.

5.84 To allow flexibility in line with changing demand over time, the allowance is calculated on two phased ten year periods which are then summed to give the total over 2013-33 rather than using a percentage of the expected requirement over 2013-33 as a whole. This means that adequate flexibility is given across the period when it is needed.

5.85 This results in two additional sets of final figures.

Summary of scenarios: projection by area after allowances and with 10% flexibility, 2013-33

2013-33: housing scenarios	Eastern Dorset HMA (Ha)	Western Dorset HMA (Ha)	Dorset LEP area (Ha)
Trend	149.6	30.9	180.5
Planned Growth	184.8	52.8	237.6
Accelerated Growth	196.9	53.3	250.2
Step change	208.4	53.3	261.7

Table 5.17

Summary of scenarios: projection by area after allowances and with 20% flexibility, 2013-33

2013-33: housing scenarios	Eastern Dorset HMA (Ha)	Western Dorset HMA (Ha)	Dorset LEP area (Ha)
Trend	158.5	32.0	190.5
Planned Growth	196.9	55.9	252.8
Accelerated Growth	210.1	56.4	266.6
Step change	222.7	56.4	279.1

Table 5.18

Summary of scenarios: projection by area after allowances, zero flexibility, 2013-33

2013-33: housing scenarios	Eastern Dorset HMA (Ha)	Western Dorset HMA (Ha)	Dorset LEP area (Ha)
Trend	140.7	29.8	170.5
Planned Growth	172.7	49.7	222.4
Accelerated Growth	183.7	50.2	233.9
Step change	194.1	50.2	244.3

Table 5.19

5.86 The full employment land demand tables are set out in **Appendix G, H, I and J** which provides projection figures for the growth scenario options across all the phasing periods.

6 Employment Land Supply

6.1 This chapter examines current employment land supply within the Dorset LEP area and the Eastern and Western Dorset HMAs. Chapter 5 of the Workspace Strategy has established 4 growth scenarios and these will be balanced against current employment land supply in Chapter 7.

6.2 The employment land supply data used in this chapter has been provided by each of the local authorities within the Dorset LEP area and represents the current land supply which is deliverable over the study period 2013 - 33. Employment land supply for each of the local authorities is set out by 5 year phasing periods and by HMA for the period 2013 – 2033 and is defined as land which is available for development including vacant land or land with long term vacant buildings.[19]

6.3 This chapter sets out an overview of employment land supply for the Dorset LEP area and the Eastern and Western Dorset HMAs with projected phasing of land delivery over the study period to 2033. Key sites of strategic significance to employment land supply for the Dorset LEP area including their current status are also identified. This updates the site analysis from the 2008 Workspace Strategy.

EMPLOYMENT LAND SUPPLY OVERVIEW

6.4 The following definitions for the phasing of land availability have been applied which is consistent with the districts' employment land reviews and approach adopted in previous Workspace Studies. The phasing of availability reflects the projected periods for site delivery and completion as opposed to the point at which a site becomes available to the market.

- Short Term: site can be developed within 0 - 2 years
- Medium Term: site is likely to be developed in 3 - 5 years
- Long Term: site is not likely to be developed within the next 5 years

6.5 In terms of site size the following definition has been applied:

- Very Large: >10 ha
- Large 2 - 9.99 ha
- Medium: 0.5 - 1.99 ha
- Small: <0.5 ha

19 As with land there is a need for frictional vacancy for the property market to function smoothly. Vacant units that are part of short term vacant buildings are therefore not considered as part of the employment land supply.

6.6 The total supply of employment land identified by the local authorities within the Dorset LEP area which is currently available totals 340ha. Of the total 340ha, 100 ha of land is available in the short term and developable in the next two years and 110 ha of land is available in the medium term and is projected to come forward within the next 3 – 5 years. The remaining 130 ha is likely to come forward in the long term in over 5 years' time and this is based on the projected phasing of site delivery based on current local authority assessment. There is potential for a significant amount of additional land to be added to the supply of 340ha through the Local Plan review process, in this regard the Borough of Poole and Purbeck District Council are currently considering potential additional sites. There is potential for an employment land supply of approximately 397ha across the Dorset LEP area with the inclusion of additional sites in Poole and Purbeck which are currently being considered as part of Local Plan reviews. There is also potential for a higher rate of development to come forward in the short and medium term subject to a range of factors including market demand, land owners bringing sites forward and the phasing of infrastructure improvements.

Area	Short (Ha)	%	Medium (Ha)	%	Long (Ha)	%	Total (Ha)
Eastern Dorset	82.63	24%	92.23	27%	101.22	30%	276
Western Dorset	17.33	5%	17.33	5%	29.30	9%	64
Total:	**100**	**29%**	**110**	**32%**	**130**	**39%**	**340**

Table 6.1 Eastern and Western Dorset - Available Land by Phasing

6.7 The Eastern Dorset HMA has 276ha of available employment land which constitutes over 81% of the total employment land supply for the study area (340ha for Eastern and Western Dorset combined). Of the 276ha available in Eastern Dorset, 83ha (30%) is projected to come forward in the short term (0-2 years), 92ha (33%) in the medium term (3-5 years) and 101ha (37%) in the long term (5 Years +).

6.8 Of the 276ha available employment land supply in Eastern Dorset 119ha (43%) is located in Christchurch and East Dorset which includes the strategic sites of Bournemouth Airport (54ha), Blunts Farm (30ha) and Woolsbridge (13.1ha). Bournemouth Borough has a land supply of 16ha (6% of supply in Eastern Dorset) which includes Castle Lane East (Riverside Avenue) 6ha. The Borough of Poole currently has a land supply of 66.34ha (24% of supply in Eastern Dorset) which includes the strategic sites of Magna Business Park (10ha) and Highmoor Farm (Talbot Village) (11.5ha). The Borough of Poole is currently undertaking a Local Plan review which may add approximately 30ha to the existing land supply with the consideration of North Poole. North Dorset has an employment land supply of 30ha (11% of supply in Eastern Dorset) which includes Brickfields Park (9ha). Purbeck has a land supply of approximately 44ha (16% of supply in Eastern Dorset) which includes Dorset Green Technology Park (30ha). Purbeck are also currently undertaking a review of their Local Plan which has the potential to add approximately a further 27ha to the existing land supply.

6.9 The Western Dorset HMA has 64 ha of available employment land which constitutes 19% of employment land for the study area (Eastern and Western Dorset combined). Of the 64ha available in Western Dorset, 17ha (27%) is projected to come forward in the short term (0-2 years), 17ha (27%) in the medium term (3-5 years) and 29ha (46%) in the long term (5 Years +). Of the 64 ha available employment land supply the Littlemoor Urban Extension provides 12ha and Osprey Quay is capable of delivering a further 8.8ha.

6.10 Across the study area of Eastern and Western Dorset there are 9 very large employment sites (above 10ha) which account for 170ha (50%) of the total available employment land. Their size, location and availability is set out in Table 6.2.

HMA	Local Authority	Address	Availability	Available Land (ha)
Eastern Dorset	Christchurch	Aviation Park West	Short Term	34
Eastern Dorset	Christchurch	Aviation Park East	Medium Term	20
Eastern Dorset	East Dorset	Blunts Farm	Medium Term	30
Eastern Dorset	East Dorset	Woolsbridge	Short Term	13.1
Eastern Dorset	NDDC	Brickfields Business Park	Medium Term	9
Eastern Dorset	Poole	Magna Business Park, Magna Road	Medium Term	10
Eastern Dorset	Poole	Highmoor Farm Digital Village, Talbot Village, Wallisdown	Long Term	11.5
Eastern Dorset	Purbeck	Dorset Green Technology Park	Short Term	30
Western Dorset	Weymouth	Littlemoor Urban Extension	Medium Term	12
Total				**170 ha**

Table 6.2 Very Large Available Employment Sites

6.11 In Eastern Dorset there is 158ha of land available on very large sites which is 46% of the total land supply across Eastern and Western Dorset. There is also 76ha of available land on large sites in Eastern Dorset which accounts for 22% of total available land across Eastern and Western Dorset.

6.12 There are 21 large sites in Eastern and Western Dorset (2 - 9.99 ha) which accounts for 114ha (33%) of the total available employment land supply for the whole study area. There are also 69 sites below 2ha in Eastern and Western Dorset which account for 56ha (16%) of total available employment land supply as set out in the table below.

Area	Very Large (Ha)	Large (Ha)	Medium (Ha)	Small (Ha)	Total (Ha)
Eastern Dorset	157.60	76.21	39.16	3.11	**276**
Western Dorset	12	37.86	11.27	2.82	**64**
Total	**169.60**	**114.07**	**50.43**	**5.93**	**340**

Table 6.3 Available Land by Size

6.13 Very large sites (>10 ha) make up 170ha (50%) employment land supply in Eastern and Western Dorset of which 81ha (24%) is projected to come forward in the short / medium term and 88.5ha (26%) in the long term. Large sites (2- 9.99ha) account for 114ha of which 81ha (24%) is projected to come forward in the short / medium term and 32ha (10%) in the long term. Medium and small sites (Less than 2ha) account for 56ha (16%) of available employment land supply in Eastern and Western Dorset as set out in the table below. Of these sites 14% are projected to come forward in the short to medium term.

6.14 Eastern Dorset contains the bulk of employment land supply, particularly in terms of very large and large sites available in the short to medium term (138ha, 40% of total land supply across Eastern and Western Dorset).

Eastern and Western Dorset										
Phasing	Very Large		Large		Medium		Small		Total	
	Ha	%	Ha	%	Ha	%	Ha	%	Ha	%
Long	88.50	26%	32.68	10%	5.29	1.50%	2.07	0.6%	128.54	38%
Medium	52.55	16%	36.89	11%	20.17	6%	1.94	0.6%	111.54	33%
Short	28.55	8%	44.50	13%	24.97	7%	1.93	0.6%	99.94	29%
Total	**169.60**	**50%**	**114.07**	**34%**	**50.43**	**14.5%**	**5.94**	**1.8%**	**340**	**100%**

Table 6.4 Available Land by Size and Phasing

Eastern Dorset										
Phasing	Very Large		Large		Medium		Small		Total	
	Ha	%	Ha	%	Ha	%	Ha	%	Ha	%
Long	83.50	30%	12.08	4.3%	3.24	1.2%	0.40	0.1%	99.22	36%
Medium	49.05	18%	28.26	10%	15.56	6%	1.36	0.5%	94.23	34%
Short	25.05	9%	35.87	13%	20.36	7.4%	1.35	0.5%	82.63	30%
Total	**157.6**	**57%**	**76.21**	**27.3%**	**39.16**	**14.6%**	**3.11**	**1.1%**	**276**	**100%**

Table 6.5 Available Land by Size and Phasing

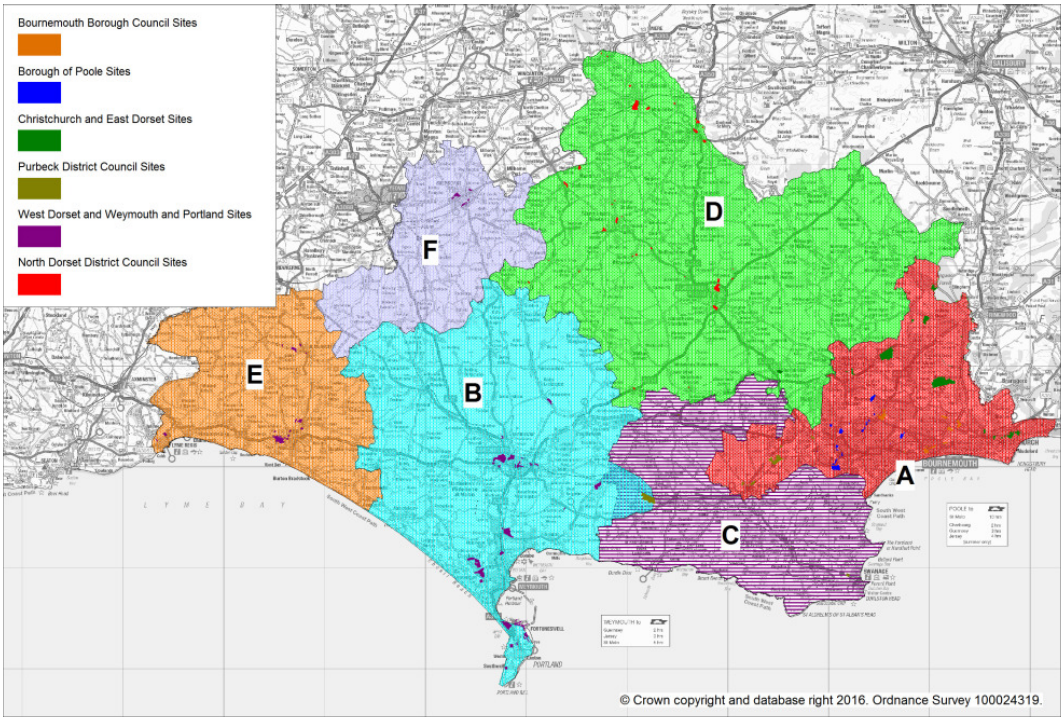
Western Dorset										
Phasing	Very Large		Large		Medium		Small		Total	
	Ha	%	Ha	%	Ha	%	Ha	%	Ha	%
Long	5	8%	20.60	32%	2.05	3.2%	1.67	2.6%	29.32	46%
Medium	3.5	5.5%	8.63	13.5%	4.61	7.2%	0.58	0.9%	17.31	27%
Short	3.5	5.5%	8.63	13.5%	4.61	7.2%	0.58	0.9%	17.31	27%
Total	**12**	**19%**	**37.86**	**59%**	**11.27**	**17.6%**	**2.83**	**4.4%**	**64**	**100%**

Table 6.6 Available Land by Size and Phasing

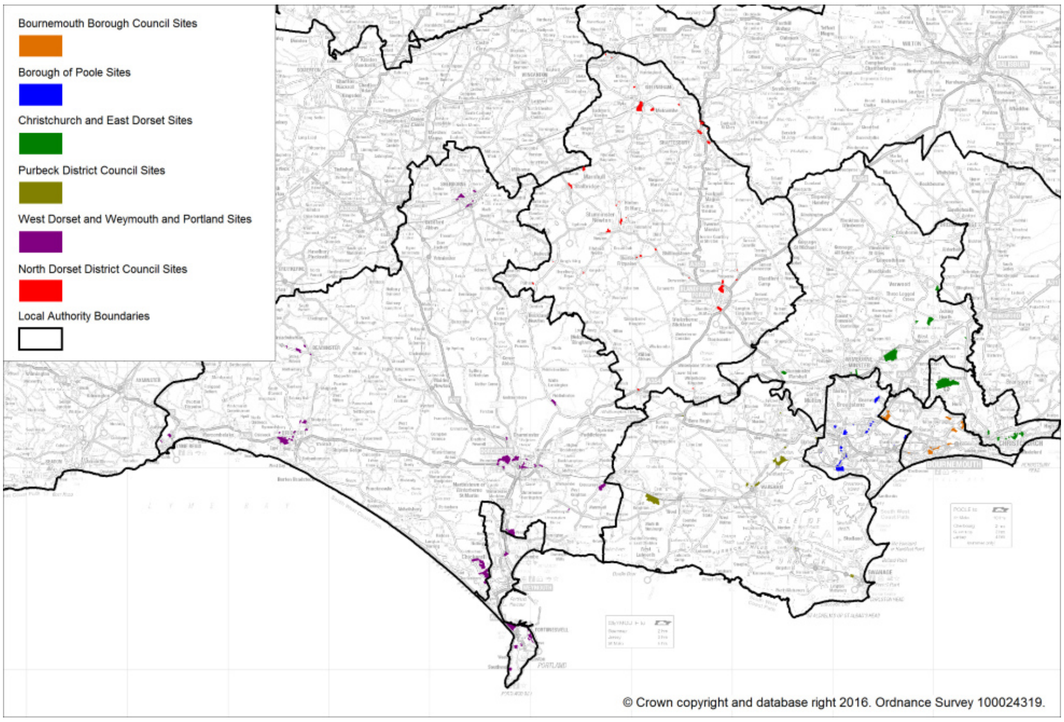
6.15 Large sites which are potentially available for development within the next 2 years account for 44ha (13%) of available employment land supply in Eastern and Western Dorset.

Area	Local Authority	Address	Availability	Available Land (Ha)
Eastern Dorset	Bournemouth	Castle Lane East (Riverside Avenue)	Short Term	6.01
Eastern Dorset	Bournemouth	Wallisdown Road B (Proctor and Gamble)	Short Term	3.37
Eastern Dorset	East Dorset	East of Cobham Road, Ferndown	Short Term	8.43
Eastern Dorset	East Dorset	Bailie Gate Employment Allocation	Short Term	3.3
Eastern Dorset	Borough of Poole	Magna Business Park, Magna Road	Short Term	4.89
Eastern Dorset	Borough of Poole	Poole Port	Short Term	4.5
Eastern Dorset	Purbeck	Holton Heath Trading Park	Short Term	5.0
Eastern Dorset	Purbeck	Sandford Lane, Wareham	Short Term	2.48
Eastern Dorset	North Dorset	South of A30	Short Term	6.20
Total:				**44.18**

Table 6.7 Large Sites Available in the Short Term



Map 6.1 Employment Land Distribution by Commercial Property Market Area



Map 6.2 Employment Land Distribution By Local Authority Area

SITE SPECIFIC CONSIDERATIONS

AVIATION PARK WEST AND EAST, CHRISTCHURCH

6.16 Employment land located at Bournemouth Airport is comprised of Aviation Parks West and East. The Aviation Parks are separated by the former north – south runway and an active taxiway system and provide some 172,000sqm of existing floorspace supporting an employment population of almost 2,500. The Business Parks provide a wide combination of B1, B2 and B8 uses, with particularly significant levels of aviation industrial floorspace. The current split across these uses classes is: B1 20%, B2 34%, B8 12% and aviation accounting for the remaining 34%. There is a varied mix of buildings in terms of size, age and condition and vacant and under-used areas of land available for development.

6.17 Policy BA1 of the adopted Core Strategy sets out the vision for the operational airport and the airport business parks. The vision states that the northern business parks will be redeveloped to provide a range of employment land and premises to serve the needs of the local and sub-regional economy. The business parks are identified with the potential to attract inward investment from knowledge based sectors including aviation related sectors.

6.18 Policy BA2 of the Core Strategy provides the strategic allocation for the Aviation Business Parks and sets out the strategy for the development of Aviation Parks West and East. The Aviation Parks are collectively identified as a key strategic site within the sub-region and are required to contribute towards future land requirements in Eastern Dorset, particularly in view of the undersupply of employment land in Bournemouth. There is a suggested potential of approximately 54 hectares of (re) developable employment land remaining across the two parks. At Aviation Park West it is considered that there is 34ha of land available in the short term and 20ha available in the medium term at Aviation Park East.

6.19 The land is allocated primarily for employment uses (B1, B2 & B8) but non B class uses that create high quality employment opportunities and contribute to raising levels of economic productivity will also be supported. Similarly non-employment uses ancillary to the core employment functions and sufficient to meet the needs of the working population (convenience retail, restaurant, banking, amenity space, conference & leisure) will also be supported.

6.20 The latest economic assessment produced by Nathaniel Lichfield and Partners on behalf of Christchurch Borough Council identifies greatest demand at the business park from the following sectors:

- General Manufacturing
- Advanced Engineering
- Financial / Business Services
- ICT
- Distribution / Logistics

6.21 A package of transport infrastructure projects were submitted for funding along the B3073 corridor, originally through a City Deal bid that was subsumed into the Growth Deal. The original City Deal bid was valued at £96M and intended to facilitate the delivery of 60ha of employment development at the Airport Business Park, 10,000 jobs and £500M of GVA growth. Through the Growth Deal Rounds 1 and 2 £41.5M of schemes have been funded.

6.22 The major schemes that formed part of the original bid have been funded with the exception of Parley Link Road East, Parley Link Road West, Parley Cross Roads and the cycle and bus enhancements along the B3073. The projects that have already received funding through Growth Deal rounds 1 and 2 include the following:

- The reconstruction of the A338 (Phase 1)
- The upgrading of Hurn Roundabout (Phase 1)
- The upgrading of Chapel Gate Junction (Phase 1)
- The redevelopment of Blackwater Junction (Phase 1)
- The improvement of Longham Mini Roundabouts (Phase 1)
- The widening of the A338 from Cooper Dean to Blackwater Junction (Phase 1)

6.23 Bids were submitted for Growth Deal Round 3 for the following schemes:

- Parley Cross Western Development Link Road (Phase 2)
- Parley Cross Eastern Development Link Road (Phase 2)
- Parley Cross Junction Improvement (Phase 2)
- B3073 Strategic Cycling Improvements and B3073 Bus Improvements (Phase 2)

6.24 An internal link road between the North West and North East business parks will be delivered by the Airport landowner as part of Phase 3.

6.25 These planned highways infrastructure improvements will facilitate delivery of the remaining development potential of the business park in combination with planned housing growth in the wider area including approximately 500 new homes at West Parley.

6.26 The delivery trajectory for employment land at the business park is projected to be at 1ha per annum, rising to 2-3ha per annum from 2018 and to 4-5ha per annum from 2022 which coincides with the programme of highways infrastructure improvements set out above.

6.27 Christchurch Borough Council is considering the preparation of a Local Development Order (LDO) for Bournemouth Airport Business Park. A Local Development Order for the Aviation Parks will serve as a simplified planning zone which will grant permission for the type of development specified in the LDO. For development proposals within the scope of the LDO planning applications would not be necessary. The purpose of the Aviation Park LDO is to facilitate the accelerated redevelopment of an already successful employment area to maximise the opportunity it can bring to the conurbation and more widely in Dorset. An LDO would provide greater confidence to investors to be able to assemble sites to offer opportunities for redevelopment.

6.28 Manchester Airports Group is currently in the process of updating master planning for the Aviation Parks. This will update the current position in relation to land and floor space supply.

BLUNTS FARM, FERNDOWN, EAST DORSET

6.29 Policy FWP8 of the adopted Christchurch and East Dorset Core Strategy allocates 30ha of land at Blunts Farm for employment development (B1, B2 and B8 use classes including ancillary support services such as cafes). The policy also requires the preparation of a detailed development brief. This site is of strategic importance in terms of the future employment land requirements for Eastern Dorset.

6.30 Blunts Farm is within the land ownership of the Forestry Commission who intend to commission master planning work for the site. It is considered that the site is available in the medium term and application is anticipated in 2017 / 18. The phasing of availability is estimated at 7.5ha for each 5 year phasing period during the study period 2013 – 2033.

6.31 Any requirement for highways infrastructure improvements related to this site will form part of the planning application process.

WOOLSBRIDGE INDUSTRIAL ESTATE, THREE LEGGED CROSS, EAST DORSET

6.32 Policy VTSW6 of the adopted Christchurch and East Dorset Core Strategy allocates 13.1ha of land at Woolsbridge Industrial Estate for employment development (B1, B2 and B8 use classes). The policy also requires the preparation of a detailed development brief. This site is of strategic importance in terms of the future employment land requirements for Eastern Dorset.

6.33 The site has recently received outline planning consent and is available in the short term. It is considered that the 13.1 ha will come forward over the first 10 year period to 2023 at an estimated rate of 6.55ha per 5 year period. Outline consent has been granted for a mixed employment development with a maximum floor space of 33,400 sqm for Office, Research & Development, Light Industrial, General Industrial or Storage & Distribution use (including trade counter)(use classes B1a, B1b, B1c, B2 & B8) and ancillary floor space under use classes A1, A3, A5, D1 & D2. The remaining developable land that forms part of the allocation is in separate land ownership and will come forward as part of a separate planning application.

6.34 The recently consented development will be providing a new signalised junction at Horton Road and Old Barn Farm Road and a new cycle / pedestrian link to the Castleman Trailway.

FERNDOWN, EAST OF COBHAM ROAD, EAST DORSET

6.35 The East of Cobham Road site was allocated in the 2002 East Dorset Local Plan.

6.36 The site has received planning consent, the section 106 has been signed and the site is available in the short term. A financial contribution has been secured towards improvements on Ringwood Road which will be delivered as part of DCC's planned programme of works. The site is available in the short term and is capable of coming forward immediately and is not constrained by the delivery of the planned improvements to Ringwood Road. The site has a capacity of 8.43ha and is projected to come forward in the short term within the first 5 year phasing period 2013 – 18.

CASTLE LANE EAST (RIVERSIDE AVENUE), BOURNEMOUTH

6.37 Castle Lane East is by far the single largest available employment land site within Bournemouth. The site is in land allocated for employment purposes in the adopted Bournemouth Local Plan – Core Strategy 2012. The site has remained undeveloped due to capacity constraints on the local road network. A new grade separated junction is required from the A338 to allow the development of the site to progress. The site is otherwise readily available for development. The Local Plan allocation indicates that B1, B2 or B8 uses would be appropriate.

6.38 Indicative LEP funding for the Wessex Way/Castle Lane East project has been awarded and work is ongoing to investigate the potential for further planning obligation funding to secure an adequate access to Wessex Fields. In the light of this potential resolution of the access issue the development of this site is considered to be a medium term option.

LAND OFF SHAFTESBURY LAND, BLANDFORD FORUM, NORTH DORSET

6.39 Planning permission for the erection of 6 buildings to be subdivided into 29 light industrial units, known as the Glenmore Business Park, was granted in 2009 on 1.1 ha of the 5.1 ha site and this continues to be built out. In 2013 planning permission was granted on 3.4 ha of the remainder of the site for a mixed-use scheme of B1/B2/B8 employment use and ASDA supermarket. This proposal has not been implemented and a planning application has since been submitted for a Lidl store on 1.5 ha.

EXTENSION TO BRICKFIELDS BUSINESS PARK, GILLINGHAM, NORTH DORSET

6.40 Land to the south of the Brickfields Business Park is allocated by the 2016 North Dorset Local Plan Part 1 as part of the Gillingham Strategic Site Allocation (SSA).

6.41 A master plan framework (MPF) is being prepared by the land promoters for the southern extension to Gillingham which is to make provision for a new access into the Brickfields Business Park from New Road (B3092) and set out how the land will be developed to provide opportunities for a range of employers.

6.42 High quality job provision and high quality built design is sought along the southern and eastern edges of the extension to the business park and more general employment uses towards the western end, further away from the main views into the site.

6.43 In order to create a new, more attractive edge to the business park and better screen the site in views from the south and west, the draft MPF also includes proposals for strategic landscape planting.

LAND SOUTH OF THE A30 AT SHAFTESBURY, NORTH DORSET

6.44 The site comprises some 6.2 ha of a larger 7 ha saved employment allocation from the 2003 North Dorset Local Plan with a frontage and direct access on to the A30. Outline planning permission was granted in 2011 for B1/B2 and ancillary B8 uses. The site is being marketed with the intention that the vendors will construct a new access to the site as well as a traffic light junction on the A30. Some remediation works are required to part of the site.

NORTH DORSET BUSINESS PARK, STURMINSTER NEWTON

6.45 The North Dorset Business Park has recently been brought into active use through public investment in infrastructure. The site layout has been developed to a design and development brief produced by SturQuest, the local community partnership, and a masterplan. The 13 plots, averaging 0.3 ha each, will be developed with reference to both the design and development brief and the masterplan which has been granted planning permission. All 13 plots are sold or under offer.

DORSET GREEN TECHNOLOGY PARK, WINFRITH, PURBECK

6.46 Dorset Green Technology Park has recently been allocated Enterprise Zone status. The Enterprise Zone includes over 50ha of employment land with the potential for development. The site has a rich history in research and development for energy and defence and contains two world class marine defence engineering companies, Atlas Elektronik and QinetiQ.

6.47 The site will have ultrafast broadband by November 2017. Infrastructure will be improved on site and surrounding areas serving the employment site. This will be principally funded through the retained business rates from new development.

HOLTON HEATH TRADING PARK, PURBECK

6.48 Holton Heath Trading Park is allocated within the current Local Plan as one of the strategic employment sites in Purbeck. Located around Poole Harbour this industrial site has approximately 5ha of vacant or underused land available in the short term and a further 5.9ha likely to be allocated by 2018.

6.49 Admiralty Park lies adjacent to Holton Heath Trading Park. It is estimated that there is around 2ha of employment land at the site that could be made available, consistent with nature conservation constraints.

6.50 These sites are in close proximity to Holton Heath Railway Station. Release of additional employment land in this location is likely to require section 106 contributions towards mitigation of highway impacts.

PORT OF POOLE

6.51 The Port of Poole is one of the major trust ports in the UK and makes a significant contribution to the economy of Poole, the Dorset LEP area and beyond. Strategic Objective 3 of the Poole Core Strategy (adopted February 2009), which relates to economic prosperity, reinforces the value of the Port to the town and its role as a major gateway to and from the Continent.

6.52 Core Strategy Policy PCS 3: Poole Port, seeks to support development of the Port as a regionally significant feeder port with the capacity to accommodate cruise ships, together with its continued handling of freight and passenger services, although any development would need to ensure no adverse affect on the integrity of the Poole Harbour SPA and Ramsar sites.

6.53 Improving access to the Port for cargo and cross-channel ferry traffic has been widely acknowledged as a priority. In March 2014, the LEP submitted its Strategic Economic Plan (SEP), 'Transforming Dorset' to central government, the purpose of which was to identify and prioritise projects in Dorset that would deliver long term economic growth. The Dorset LEP was subsequently awarded £66.4 million from the Local Growth Fund in July 2014 and a further £12.6 million in January 2015 - a total of £79 million. The Port of Poole was allocated £23.3m of this funding towards a package of highway infrastructure schemes to improve access in and around the Port, including town-side access to the port to unlock economic growth and new development sites in Poole and improvements to the A349 at Gravel Hill to improve the reliability of this important route into Poole.

6.54 The Port of Poole Master Plan (2013), provides the vision for the sustainable management, conservation and development of the Harbour for the next 25 to 30 years. One of the key objectives of the Master Plan is to improve the facilities and resources available in the Port to ensure that it remains a competitive and commercially viable operation capable of accommodating a range of shipping and marine activities. With an estate of approximately 24 hectares (60 acres), the Master Plan identifies the potential to develop a series of new facilities within and adjacent to the existing Port area. In addition, the Master Plan seeks to maintain a degree of flexibility that will enable a response to future commercial opportunities that may become available, where these meet the broader Masterplan objectives.

NORTH POOLE

6.55 In the binding report on the Poole Core Strategy, the Inspector set out his considerations in respect to employment matters which included his deliberations on the identification of a supply of employment land to meet projected need for B1, B2 or B8 uses over the period of the Core Strategy. His concerns over a potential shortfall in employment land provision led the Inspector to advise that the site at North Poole (south of Magna Road) be retained as safeguarded land for possible future employment use to provide a reasonable fall back position should the quantity of employment land required to meet Poole's identified needs fail to be met. As a consequence Core Strategy Policy PCS 30: Poole's Green Belt, was amended to include reference to the land at North Poole.

6.56 In advance of the review of the Poole Core Strategy, an outline planning application for development totalling 42,000 sqm of employment floorspace was made on the safeguarded land at North Poole. The application was refused and was the subject of a Public Inquiry whereby the Inspector granted planning permission for development of 16,000sqm of employment floorspace.

6.57 In the light of this decision, the potential allocation of the remaining area of safeguarded land, which was the subject of the planning application, for employment use was the subject of consideration as part of the Issues and Options consultation in respect of the review of the Core Strategy in February/March 2015.

6.58 A Reserved Matters application for the consented employment floorspace was granted planning permission in January 2016.

TALBOT VILLAGE, POOLE

6.59 Policy SSA 20, contained in the Poole Site Specific Allocations and Development Management Policies DPD, allocated land to the south of Wallisdown Road for a mix of housing, academic floorspace, student accommodation, sheltered accommodation, public open space and heathland buffer strip. Given that an approved outline planning permission on the site was subject to call-in by the Secretary of State and subsequent Public Inquiry, the policy also set out an alternative position should the appeal be dismissed, which was the case.

6.60 In response to the failed planning application, an informal partnership approach to the future development of the area was adopted, involving the Talbot Village Trust, the Universities, Bournemouth Borough Council and the Borough of Poole.

6.61 As a consequence, a Master Plan has been developed, supported by the Talbot Village Supplementary Planning Document (SPD), which was adopted by the Borough of Poole in December 2015.

6.62 A key element of the Master Plan/SPD provides the opportunity to create a Digital Village with the potential to offer facilities to grow businesses related to digital industries such as computer games manufacturers, mobile technologies, cyber security and computer generated animation. The Universities are recognised for their academic excellence in this sector and this form of development would enable highly skilled graduates to be retained in the local economy, with resulting benefits to other local businesses and the wider area.

6.63 It is anticipated that the Digital Village, a focus for digital and creative industries and economic activity emerging from the Universities, would occupy land of approximately 11.5 hectares in area, with the first phase commencing in the five year period 2018-2023.

STERTE AVENUE WEST, POOLE

6.64 Vacant land at Sterte Avenue West, with an area of 4.78 hectares, has a current allocation for employment uses (Use Class B1, B2 & B8) and was identified as an employment site of strategic significance to Poole in the Site Specific Allocations and Development Management Policies DPD (Policy SSA 6: Land at Sterte Avenue West). The site lies within an area at future risk of flooding from the projected rise in sea level as a consequence of climate change.

6.65 The allocation of the site will be subject to re-appraisal as part of the Local Plan review process to determine its continued suitability for employment.

FLEETS CORNER, POOLE

6.66 The Fleets Corner site was included in Core Strategy Policy PCS 1, as a principal location for economic investment, and subsequently identified as an employment site of strategic significance to Poole in the Site Specific Allocations and Development Management Policies DPD (Policy SSA 3: Fleets Corner and Sopers Lane).

6.67 The site was previously promoted through the Core Strategy as being a site having potential for comprehensive rationalisation/redevelopment. Although some rationalisation has taken place and some redevelopment is planned, to date it has not been of the comprehensive scale envisaged.

6.68 The current allocation will be re-appraised as part of the Local Plan review process.

SOPERS LANE, POOLE

6.69 Sopers Lane was included in Core Strategy Policy PCS 1, as a principal location for economic investment, and subsequently identified as an employment site of strategic significance to Poole in the Site Specific Allocations and Development Management Policies DPD (Policy SSA 3: Fleets Corner and Sopers Lane).

6.70 Planning permission was granted for a care home development following a Public Inquiry on land at the western end of the site. Following a representation promoting the area between Siemens and the completed Potteries Care Home for residential use, this alternative to the current allocation was included for consideration in the Core Strategy review Issues and Options consultation.

6.71 As a consequence, the current allocation will be re-appraised as part of the Local Plan review process.

OSPREY QUAY, WEYMOUTH & PORTLAND

6.72 In 2001 a masterplan was approved for the redevelopment of 33 hectares at Osprey Quay as a mixed use scheme, with the aim of creating a centre of excellence with waterfront access for marine business and leisure. Extensive site remediation and preparation was undertaken including installation of estate roads and utilities.

6.73 Significant regeneration has taken place, some of which was associated with getting the National Sailing Academy in readiness for hosting of the 2012 Olympic and Paralympic Sailing Events. The area now contains a mix of B1, B2 and B8 plus leisure uses including a 560 berth marina and associated shore-side facilities, workspace for marine-related business, a Coastguard Helicopter Base, a marina restaurant/café, and a new school. This has created an important concentration of maritime business with a strong community feel.

6.74 The largest single business occupier is Sunseeker with a 1ha boat building yard and sheds but other occupiers include small and micro enterprises in a range of sectors. Osprey Quay now constitutes a significant employment hub including a proportion of higher skilled jobs, which is likely to prove an attractor for further marine related business.

6.75 Existing development commitments that have not yet come forward include further employment uses, a hotel, retail and residential use totalling some 5.9 Ha net developable area. The existing planning permission and section 106 agreement for Osprey Quay ties the land to the mix of uses as set out in the current master plan for the site.

6.76 A new masterplan is being developed with the Homes and Communities Agency to attract further investment and employment opportunities within the site. The new masterplan will try to strike a balance between supporting the original vision of Osprey Quay as a waterside maritime business park, and accepting the more diverse demand experienced for more general manufacturing, workshop and warehouse space. This will attempt to accelerate the delivery of employment space which has been developing at less than 0.5 ha pa since 2012 and consisting of built to order premises by largely local companies who are not sensitive to the constrained road access to Portland.

LITTLEMOOR URBAN EXTENSION, WEYMOUTH & PORTLAND

6.77 The Littlemoor Urban Extension falls on the boundary between Weymouth and Portland Borough and West Dorset District Councils and has the potential to deliver significant employment and new homes over the West Dorset, Weymouth & Portland Adopted Local Plan period and potentially beyond.

6.78 It lies at the gateway of the Weymouth Relief Road, opposite the existing service centre at Littlemoor, and is close to the railway station at Upwey. As such it has excellent links to Weymouth Town Centre and the wider area. The nearby housing also provides a significant source of employees.

6.79 The urban extension is a proposed mixed use site of 12ha which includes a large business park and up to 500 family homes. The nature of the employment site, its co-location with residential areas and good edge of town road access will lend itself to principally B use class employment and uses appropriate to a local neighbourhood centre. It will be designated as a key employment site.

6.80 The proposed development will deliver highway improvements necessary for the development to go ahead although the main employment area will be designated as a key employment site and accessed directly from the Weymouth Relief Road.

6.81 In addition the development will generate a requirement for further education provision whether on and off-site. Contributions to other community infrastructure will be sought in line with policy and secured through a section 106 legal agreement.

6.82 The trajectory for delivery has not yet been defined although outline planning is being sought during 2016.

MOUNT PLEASANT / NEW LOOK, WEYMOUTH, WEST DORSET

6.83 Consent was given in 2007 for a 14ha mixed-use employment site on land owned by the retail chain New Look. The main driver was to provide a site for a new headquarters building for New Look themselves. Phase 1 now complete included the headquarters but also delivered a hotel and food-plus retail supermarket.

6.84 The remaining area of the site – 10.69ha, as phase 2 is designated as a key employment site the majority of which is still to be developed. The current masterplan includes significant additional business opportunities with 1500 sqm of industrial, 14,000 sqm of office, and 7000 sqm of non-food retail space and including small scale enterprise units.

6.85 The site is self contained with very good access to the adjacent trunk route and internal road structure. However, no phase 2 development has taken place since completion of phase 1 in 2013 and the delivery trajectory is uncertain.

POUNDBURY URBAN EXTENSION, WEST DORSET

6.86 The Poundbury Development Brief adopted in 2006 established a number of principles for development, based upon the local plan policies of that time. Outline permission was granted in December 2011 for the final phases of the development, permitting the erection of 1,200 new homes, a new 450 children primary school, 25,000 sqm of non-residential development and associated roads, drainage and other infrastructure. The plan policy DOR1 defines the whole area as a mixed-use development of homes, businesses and associated community facilities. There is approximately 6.0ha of employment land remaining undeveloped but with outline permission. Much of this will be distributed throughout the urban extension in accordance with the brief.

6.87 Poundbury Parkway farm is a conventional layout site of 0.9ha within the Urban Extension and designated key employment site. The site has good road links and is located away from nearby homes and other potentially sensitive uses, and therefore provides an opportunity for less neighbourly B2 business uses to be located in the area.

6.88 The rate of future development has been assumed to continue based on past performance of developments in the plan area and indications of likely development rates provided by the developers. The Parkway farm site on the other hand is largely built out with scope to extend this site to the south-west.

BARTON FARM URBAN EXTENSION, SHERBORNE, WEST DORSET

6.89 Land at Barton Farm, Sherborne is allocated in the Adopted West Dorset, Weymouth & Portland Local Plan to meet the development needs of Sherborne. The allocation is intended to deliver about 279 new homes, 3.5 ha of employment workspace and community, leisure and recreation facilities. This site now has the benefit of outline planning permission for 10,000 sqm of B1 and 2000 sqm of B2 use, as well as up to 350 sqm of flexible space to provide any combination of B1, A1, A2 & A3 uses. Demand has been strong for the employment space, thought to be on the back of the concentration of global aerospace sector businesses in the Yeovil area including Sherborne. The residential element of the site is under construction.

7 Balancing Employment Land Supply and Demand

7.1 Chapter 5 of the Workspace Strategy established 4 growth scenarios based on the Cambridge Econometrics Local Economy Forecasting Model (2015) combined with different levels of local housing growth related to existing Local Plan housing targets. These scenarios also include testing of the full objectively assessed housing needs identified in the Eastern and Western Dorset SHMAs (2015/14). Each of the 4 growth scenarios has also been tested with allowances of 10% and 20% for flexibility to provide further choice to the market over and above baseline projection figures. The following employment land demand scenarios have been used for the purposes of this study:

1. **Trend Scenario (Baseline / + 10% / + 20%):** This baseline scenario is based on the 2011 Census of Population workplace based employment data by district,unitary authority and by industrial sector. Employment growth rates from the Cambridge Econometrics Local Economy Forecasting Model for Dorset (2015) have then been applied with some adjustments for local knowledge, particularly in sectors showing stronger growth than would be expected in Dorset.
2. **Planned Growth Scenario (Baseline / + 10% / + 20%):** The baseline for this scenario is the 2011 Census of Population workplace based employment data by district / unitary authority and by industrial sector. The housing data is based on current adopted Local Plan housing trajectories (as of April 2016) until the end of the current respective Local Plan periods. Beyond the end of current Local Plan periods the average objectively assessed needs (OAN) are applied from the 2014, 2015 SHMAs to 2033.
3. **Accelerated Growth Scenario (Baseline / + 10% / + 20%):** The baseline for this scenario is the 2011 Census of Population workplace based employment data by district / unitary authority and by industrial sector. In Eastern Dorset, employment land projections are based on current adopted Local Plan housing trajectories (as of April 2016) to the point at which it is anticipated revised Local Plans will be in place. In Eastern Dorset, revised Local Plans are anticipated to be in place by April 2019 in Bournemouth, Christchurch & East Dorset and by 2018 in Poole, Purbeck and North Dorset. In Eastern Dorset, existing Local Plan figures are applied to the point when revised plans are in place, from this point onwards until 2033 the average objectively assessed needs from the 2015 Eastern Dorset SHMA are applied. In Western Dorset, the current adopted Local Plan housing figures have been applied (which are based on the OAN requirements from the 2014 Western Dorset SHMA) with a small increase in housing above the Planned Growth Scenario for the years 2029/30, 2030/31 to take account of a slight increase in housing in Dorchester and Sherborne.
4. **Step Change Scenario (Baseline / + 10% / + 20%) :** The baseline for this scenario is the 2011 Census of Population workplace based employment data by district / unitary authority and by industrial sector. In Eastern Dorset, employment land projections are then based on current adopted Local Plan housing

trajectories (as of April 2016) to the point at which it is anticipated revised Local Plans will be in place. In Eastern Dorset revised Local Plans are anticipated to be in place by April 2019 in Bournemouth, Christchurch & East Dorset and by 2018 in Poole, Purbeck and North Dorset. From this point onwards, the full OAN housing from the Eastern Dorset 2015 SHMA are applied. In Western Dorset, the current adopted Local Plan housing figures have been applied (which are based on the OAN requirements from the 2014 Western Dorset SHMA) with a small increase in housing above the Planned Growth Scenario for the years 2029/30, 2030/31 to take account of a slight increase in housing in Dorchester and Sherborne.

7.2 This chapter will examine how these growth scenarios balance against employment land supply in the Dorset LEP area and for the Eastern and Western Dorset HMAs over four 5 year phasing periods from 2013 to 2033. For the purposes of this study the following 2 employment land supply scenarios have been adopted:

1. **Employment Land Supply Scenario 1:** This scenario includes current employment land supply which has been identified by the local authorities of the Dorset LEP area and includes all existing Local Plan employment sites and other employment sites identified through employment land reviews that are available to the market. This has identified the following employment land supply:

    - **Bournemouth, Dorset and Poole - 340ha**
    - **Eastern Dorset - 276ha**
    - **Western Dorset - 64ha**

2. **Employment Land Supply Scenario 2:** This scenario includes the sites identified in Scenario 1 with the addition of further sites currently being considered through Local Plan reviews which have the potential to be formally allocated and form part of the land supply over the study period to 2033. This scenario includes an additional 30ha of land in the Borough of Poole and approximately a further 27ha of land in Purbeck District which reflects option sites currently being considered as part of their Local Plan review process. This has identified the following employment land supply:

    - **Bournemouth, Dorset and Poole - 397ha**
    - **Eastern Dorset - 333ha**
    - **Western Dorset - 64ha**

DEMAND AND SUPPLY BALANCE

7.3 Over the study period from 2013 - 33 and across all the employment land projection scenarios there is an overall balance between the demand and supply of employment land. At the higher end the **Step Change Scenario with 20% flexibility** identifies an employment land projected requirement of 279ha for the Dorset

LEP area which is balanced against an employment land supply of 340ha (employment land which is currently available to the market). In this scenario there is a 60.9ha surplus in supply over and above this projected requirement for the Dorset LEP area. This Step Change Scenario also identifies a projected requirement of 222.7ha for Eastern Dorset which is balanced against an employment land supply of 276ha for this area, which gives a 53.3ha surplus supply over and above the projected requirement. In Western Dorset this scenario identifies a projected requirement of 56.4ha which is balanced against an employment land supply of 64ha which provides a surplus in supply of 7.6ha over and above the projected requirement.

7.4 In the Dorset LEP area as a whole and for the Eastern Dorset HMA 70% of demand is for industrial uses including B1c, B2 and B8 use classes and 30% of demand is for B1 office over the study period 2013 - 2033. The split in demand is slightly different for Western Dorset with 78% of demand for industrial uses including B1c, B2 and B8 use classes and 22% of demand for office uses over the study period. Overall, approximately 80% of future demand for the Dorset LEP area is in Eastern Dorset and 20% of future demand in Western Dorset.

7.5 Although employment land demand and supply is in balance with some surplus for the Dorset LEP area (including Eastern and Western Dorset), employment land should be delivered commensurate with the commercial property market areas and main centres for office and industrial uses that have been established in consultation with local authorities and commercial property agents. In this respect, the main focus of the office market is in Bournemouth and Poole town centres with supporting roles performed by Bournemouth Airport Business Park and Ferndown Industrial Estate. Employment land supply in Bournemouth and Poole in particular needs to ensure that there is sufficient supply to meet projected requirements for office development. The main focus for the industrial market in the Dorset LEP area is in Eastern Dorset and includes Bournemouth Airport Business Park, Ferndown Industrial Estate (East Dorset), Woolsbridge Industrial Estate (East Dorset), Ebblake Industrial Estate (East Dorset), Dorset Green Technology Park (Winfrith), Holton Heath (Purbeck), Wallisdown and West Howe (Bournemouth). However, there is also a key industrial centre in Western Dorset located at the Granby Industrial Estate in Weymouth which also performs a significant role for the Dorset LEP area and will accommodate significant further growth.

TREND SCENARIO

	2013 - 2018			2018 - 2023			2023 - 2028			2028 - 33			Total: 2013 - 2033		
Dorset LEP Area	**Base**	**10%**	**20%**	**Base**	**10%**	**20%**	**Base**	**10%**	**20%**	**Base**	**10%**	**20%**	**Base**	**10%**	**20%**
Demand Ha	56.4	60.2	64.1	43.5	46.1	48.7	31.1	32.5	33.8	39.5	41.7	43.9	170.5	180.5	190.5
Cumulative Supply Ha	99.9	99.9	99.9	153	149.2	145.3	186.6	180.2	173.7	209	201.2	193.4	340	340	340
Cumulative Balance Ha	43.5	39.7	35.8	109.5	103.1	96.6	155.5	147.7	139.9	169.5	159.5	149.5	169.5	159.5	149.5
Eastern Dorset															
Demand Ha	48.1	51.6	55.2	34.3	36.5	38.6	25.4	26.7	28	32.8	34.8	36.8	140.7	149.6	158.5
Cumulative Supply Ha	82.6	82.6	82.6	126.7	123.2	119.6	154.8	149.1	143.4	168.2	161.2	154.2	276	276	276
Cumulative Balance Ha	34.5	31	27.4	92.4	86.7	81	129.4	122.4	115.4	135.3	126.4	117.5	135.3	126.4	117.5
Cumulative Balance Ha	**34.5**	**31**	**27.4**	**57.9**	**55.7**	**53.6**	**37**	**35.7**	**34.4**	**6**	**4**	**2**	**135.3**	**126.4**	**117.5**
Western Dorset															
Demand Ha	8.2	8.6	9	9.1	9.6	10	5.7	5.8	5.9	6.7	6.9	7.1	29.8	30.9	32
Cumulative Supply Ha	17.3	17.3	17.3	26.4	26	25.6	32	31.1	30.3	41	40	39.1	64	64	64
Cumulative Balance Ha	9.1	8.7	8.3	17.3	16.4	15.6	26.3	25.3	24.4	34.2	33.1	32	34.2	33.1	32

Table 7.1 Trend Scenario - Demand and Supply Balance (Land Supply Scenario 1)

	2013 - 2018			2018 - 2023			2023 - 2028			2028 - 33			Total: 2013 - 2033		
Dorset LEP Area	**Base**	**10%**	**20%**	**Base**	**10%**	**20%**	**Base**	**10%**	**20%**	**Base**	**10%**	**20%**	**Base**	**10%**	**20%**
Demand Ha	56.4	60.2	64.1	43.5	46.1	48.7	31.1	32.5	33.8	39.5	41.7	43.9	170.5	180.5	190.5
Cumulative Supply Ha	99.9	99.9	99.9	161	157.2	153.3	218.6	212.2	205.7	266	258.2	250.4	397	397	397
Cumulative Balance Ha	43.5	39.7	35.8	117.5	111.1	104.6	187.5	179.7	171.9	226.5	216.5	206.5	226.5	216.5	206.5
Eastern Dorset															
Demand Ha	48.1	51.6	55.2	34.3	36.5	38.6	25.4	26.7	28	32.8	34.8	36.8	140.7	149.6	158.5
Cumulative Supply Ha	82.6	82.6	82.6	134.7	131.2	127.6	186.8	181.1	175.4	225.2	218.2	211.2	333	333	333
Cumulative Balance Ha	34.5	31	27.4	100.4	94.7	89	161.4	154.4	147.4	192.3	183.4	174.5	192.3	183.4	174.5
Western Dorset															
Demand Ha	8.2	8.6	9	9.1	9.6	10	5.7	5.8	5.9	6.7	6.9	7.1	29.8	30.9	32
Cumulative Supply Ha	17.3	17.3	17.3	26.4	26	25.6	32	31.1	30.3	41	40	39.1	64	64	64
Cumulative Balance Ha	9.1	8.7	8.3	17.3	16.4	15.6	26.3	25.3	24.4	34.2	33.1	32	34.2	33.1	32

Table 7.2 Trend Scenario - Demand and Supply Balance (Land Supply Scenario 2)

7.6 The **Trend scenario** is based on the 2011 Census of Population workplace based employment data by district/unitary authority and by industrial sector. Employment growth rates from the Cambridge Econometrics Local Economy Forecasting Model for Dorset (2015) have then been applied with some adjustments for local knowledge, particularly in sectors showing stronger growth than would be expected in Dorset.

7.7 Overall demand for the Dorset LEP area is 170.5ha (Baseline), 180.5ha (10% flexibility) and 190ha (20% flexibility), and these projection scenarios are easily met by an employment land supply of 340ha (which is currently available to the market) and with no shortages over the phasing periods. For the higher end scenario at 20% flexibility this gives a surplus in land supply of 149.5ha. With the Employment Land Scenario 2 there is an additional 57ha of land supply in Eastern Dorset which provides an additional surplus of land which may come forward.

7.8 In Eastern Dorset there is a demand for 140.7ha (Baseline), 149.6ha (10% flexibility) and 158.5ha (20% flexibility) which is balanced by an employment land supply of 276ha and with no shortfalls in supply across the phasing periods. For the higher end scenario at 20% flexibility this gives a surplus in employment land supply of 117.5ha. The Employment Land Scenario 2 provides a potential additional 57ha of land towards this growth projection.

7.9 In Western Dorset there is demand for 29.8ha (Baseline), 30.9ha (10% Flexibility) and 32ha (20% flexibility) which is balanced against an employment land supply of 64ha and with no shortfalls in land supply across the phasing periods. For the higher end scenario at 20% flexibility this gives a surplus in employment land supply of 32ha. For Western Dorset the employment land supply is identical between Employment Land Scenarios 1 and 2.

PLANNED GROWTH SCENARIO

	2013 - 2018			2018 - 2023			2023 - 2028			2028 - 33			Total: 2013 - 2033		
Dorset LEP Area	Base	10%	20%	Base	10%	20%	Base	10%	20%	Base	10%	20%	Base	10%	20%
Demand Ha	60.7	65.1	69.4	67.4	72.4	77.4	45.4	48.2	51	48.9	52	55.1	222.4	237.6	252.8
Cumulative Supply Ha	99.9	99.9	99.9	148.7	144.3	140	158.4	149	139.7	166.5	154.3	142.2	340	340	340
Cumulative Balance Ha	39.2	34.8	30.5	81.3	71.9	62.6	113	100.8	88.7	117.6	102.4	87.2	117.6	102.4	87.2
Eastern Dorset															
Demand Ha	46.9	50.3	53.7	50.7	54.5	58.3	34.4	36.5	38.6	40.7	43.5	46.2	172.7	184.8	196.9
Cumulative Supply Ha	82.6	82.6	82.6	127.9	124.5	121.1	139.6	132.4	125.2	144	134.7	125.4	276	276	276
Cumulative Balance Ha	35.7	32.3	28.9	77.2	70	62.8	105.2	95.9	86.6	103.3	91.2	79.1	103.3	91.2	79.1
Western Dorset															
Demand Ha	13.8	14.7	15.6	16.7	17.9	19.1	11	11.7	12.3	8.2	8.5	8.9	49.7	52.8	55.9
Cumulative Supply Ha	17.3	17.3	17.3	20.8	19.9	19	18.8	16.7	14.6	22.5	19.7	17	64	64	64
Cumulative Balance Ha	3.5	2.6	1.7	4.1	2	-0.1	7.8	5	2.3	14.3	11.2	8.1	14.3	11.2	8.1

Table 7.3 Planned Growth Scenario - Demand and Supply Balance (Land Supply Scenario 1)

	2013 - 2018			2018 - 2023			2023 - 2028			2028 - 33			Total: 2013 - 2033		
Dorset LEP Area	Base	10%	20%	Base	10%	20%	Base	10%	20%	Base	10%	20%	Base	10%	20%
Demand Ha	60.7	65.1	69.4	67.4	72.4	77.4	45.4	48.2	51	48.9	52	55.1	222.4	237.6	252.8
Cumulative Supply Ha	99.9	99.9	99.9	156.7	152.3	148	190.4	181	171.7	223.5	211.3	199.2	397	397	397
Cumulative Balance Ha	39.2	34.8	30.5	89.3	79.9	70.6	145	132.8	120.7	174.6	159.4	144.2	174.6	159.4	144.2
Eastern Dorset															
Demand Ha	46.9	50.3	53.7	50.7	54.5	58.3	34.4	36.5	38.6	40.7	43.5	46.2	172.7	184.8	196.9
Cumulative Supply Ha	82.6	82.6	82.6	135.9	132.5	129.1	171.6	164.4	157.2	201	191.7	182.4	333	333	333
Cumulative Balance Ha	35.7	32.3	28.9	85.2	78	70.8	137.2	127.9	118.6	160.3	148.2	136.1	160.3	148.2	136.1
Western Dorset															
Demand Ha	13.8	14.7	15.6	16.7	17.9	19.1	11	11.7	12.3	8.2	8.5	8.9	49.7	52.8	55.9
Cumulative Supply Ha	17.3	17.3	17.3	20.8	19.9	19	18.8	16.7	14.6	22.5	19.7	17	64	64	64
Cumulative Balance Ha	3.5	2.6	1.7	4.1	2	-0.1	7.8	5	2.3	14.3	11.2	8.1	14.3	11.2	8.1

Table 7.4 Planned Growth Scenario - Demand and Supply Balance (Land Supply Scenario 2)

7.10 The baseline for this scenario is the 2011 Census of Population workplace based employment data by district, unitary authority and by industrial sector. Housing data is then applied based on current adopted Local Plan (as of April 2016) housing trajectories until the end of the current respective Local Plan periods. Beyond the end of plan periods the average objectively assessed housing needs (OAN) are applied to 2033 as taken from the Eastern and Western Dorset SHMAs (2015/14).

7.11 Overall employment land demand for the Dorset LEP area is 222.4ha (Baseline), 237.6ha (10% Flexibility) and 252.8ha (20% Flexibility) which is easily met by an employment land supply of 340 ha (currently available to the market). For the higher end projection scenario at 20% flexibility this gives a surplus in land supply of 87.2ha. With the Employment Land Scenario 2 there is an additional 57ha of land supply in Eastern Dorset which provides an additional surplus of land.

7.12 In Eastern Dorset there is a demand for 172.7ha (Baseline), 184.8ha (10% flexibility) and 196.9ha (20% flexibility) which is balanced by an employment land supply of 276ha and for the higher end scenario at 20% flexibility this gives a surplus in employment land supply of 79.1ha. The Employment Land Scenario 2 provides a potential additional 57ha of land towards this growth projection.

7.13 In Western Dorset there is demand for 49.7ha (Baseline), 52.8ha (10% Flexibility) and 55.9ha (20% flexibility) which is balanced against an employment land supply of 64ha. For the higher end scenario at 20% flexibility this gives a surplus in employment land supply of 8.1ha.

ACCELERATED GROWTH SCENARIO

	2013 - 2018			2018 - 2023			2023 - 2028			2028 - 33			Total: 2013 - 2033		
Dorset LEP Area	Base	10%	20%	Base	10%	20%	Base	10%	20%	Base	10%	20%	Base	10%	20%
Demand Ha	60.7	65.1	69.4	69.5	74.7	79.9	53.8	57.4	61	49.8	53	56.2	233.9	250.2	266.6
Cumulative Supply Ha	99.9	99.9	99.9	148.7	144.3	140	156.3	146.7	137.2	156	142.8	129.7	340	340	340
Cumulative Balance Ha	39.2	34.8	30.5	79.2	69.6	60.1	102.5	89.3	76.2	106.1	89.8	73.4	106.1	89.8	73.4
Eastern Dorset															
Demand Ha	46.9	50.3	53.7	52.8	56.8	60.8	42.8	45.7	48.7	41.2	44	46.8	183.7	196.9	210.1
Cumulative Supply Ha	82.6	82.6	82.6	127.9	124.5	121.1	137.5	130.1	122.7	133.5	123.2	112.8	276	276	276
Cumulative Balance Ha	35.7	32.3	28.9	75.1	67.7	60.3	94.7	84.4	74	92.3	79.1	65.9	92.3	79.1	65.9
Western Dorset															
Demand Ha	13.8	14.7	15.6	16.7	17.9	19.1	11	11.7	12.3	8.6	9	9.4	50.2	53.3	56.4
Cumulative Supply Ha	17.3	17.3	17.3	20.8	19.9	19	18.8	16.7	14.6	22.5	19.7	17	64	64	64
Cumulative Balance Ha	3.5	2.6	1.7	4.1	2	-0.1	7.8	5	2.3	13.8	10.7	7.6	13.8	10.7	7.6

Table 7.5 Accelerated Growth Scenario - Demand and Supply Balance (Land Supply Scenario 1)

	2013 - 2018			2018 - 2023			2023 - 2028			2028 - 33			Total: 2013 - 2033		
Dorset LEP Area	Base	10%	20%	Base	10%	20%	Base	10%	20%	Base	10%	20%	Base	10%	20%
Demand Ha	60.7	65.1	69.4	69.5	74.7	79.9	53.8	57.4	61	49.8	53	56.2	233.9	250.2	266.6
Cumulative Supply Ha	99.9	99.9	99.9	156.7	152.3	148	188.3	178.7	169.2	213	199.8	186.7	397	397	397
Cumulative Balance Ha	39.2	34.8	30.5	87.2	77.6	68.1	134.5	121.3	108.2	163.1	146.8	130.4	163.1	146.8	130.4
Eastern Dorset															
Demand Ha	46.9	50.3	53.7	52.8	56.8	60.8	42.8	45.7	48.7	41.2	44	46.8	183.7	196.9	210.1
Cumulative Supply Ha	82.6	82.6	82.6	135.9	132.5	129.1	169.5	162.1	154.7	190.5	180.2	169.8	333	333	333
Cumulative Balance Ha	35.7	32.3	28.9	83.1	75.7	68.3	126.7	116.4	106	149.3	136.1	122.9	149.3	136.1	122.9
Western Dorset															
Demand Ha	13.8	14.7	15.6	16.7	17.9	19.1	11	11.7	12.3	8.6	9	9.4	50.2	53.3	56.4
Cumulative Supply Ha	17.3	17.3	17.3	20.8	19.9	19	18.8	16.7	14.6	22.5	19.7	17	64	64	64
Cumulative Balance Ha	3.5	2.6	1.7	4.1	2	-0.1	7.8	5	2.3	13.8	10.7	7.6	13.8	10.7	7.6

Table 7.6 Accelerated Growth Scenario - Demand and Supply Balance (Land Supply Scenario 2)

7.14 The baseline for this scenario is the 2011 Census of Population workplace based employment data by district / unitary authority and by industrial sector. In Eastern Dorset, employment land projections are based on current adopted Local Plan housing trajectories (as of April 2016) to the point at which it is anticipated revised Local Plans will be in place. In Eastern Dorset, revised Local Plans are anticipated to be in place by April 2019 in Bournemouth, Christchurch & East Dorset and by 2018 in Poole, Purbeck and North Dorset. In Eastern Dorset, existing Local Plan figures are applied to the point when revised plans are in place, from this point onwards until 2033 the average objectively assessed needs from the 2015 Eastern Dorset SHMA are applied. In Western Dorset, the current adopted Local Plan housing figures have been applied (which are based on the OAN requirements from the 2014 Western Dorset SHMA) with a small increase in housing above the Planned Growth Scenario for the years 2029/30, 2030/31 to take account of a slight increase in housing in Dorchester and Sherborne.

7.15 Overall employment land demand for the Dorset LEP area is 233.9ha (Baseline), 250.2ha (10% Flexibility) and 266.6ha (20% Flexibility) which is easily met by an employment land supply of 340 ha (currently available to the market). For the higher end scenario at 20% flexibility this gives a surplus in land supply of 73.4ha. With the Employment Land Scenario 2 there is an additional 57ha of land supply in Eastern Dorset which provides an additional surplus of land.

7.16 In Eastern Dorset there is a demand for 183.7ha (Baseline), 196.9ha (10% flexibility) and 210.1ha (20% flexibility) which is balanced by an employment land supply of 276ha and gives an overall surplus in employment land supply of 65.9ha in relation to the 20% flexibility scenario. With the Employment Land Scenario 2 there is an additional 57ha of land supply in Eastern Dorset which provides an additional surplus of land.

7.17 In Western Dorset there is demand for 50.2ha (Baseline), 53.3ha (10% Flexibility) and 56.4ha (20% flexibility) which is balanced against an employment land supply of 64ha providing a surplus in employment land supply of 7.6ha for the 20% Flexibility Scenario.

STEP CHANGE GROWTH SCENARIO

	2013 - 2018			2018 - 2023			2023 - 2028			2028 - 33			Total: 2013 - 2033		
Dorset LEP Area	Base	10%	20%	Base	10%	20%	Base	10%	20%	Base	10%	20%	Base	10%	20%
Demand Ha	60.7	65.1	69.4	73	78.5	84.1	57.2	61.1	65.1	53.4	57	60.6	244.3	261.7	279.1
Cumulative Supply Ha	99.9	99.9	99.9	148.7	144.3	140	152.8	142.9	133	149.1	135.3	121.4	340	340	340
Cumulative Balance Ha	39.2	34.8	30.5	75.7	65.8	55.9	95.6	81.8	67.9	95.7	78.3	60.9	95.7	78.3	60.9
Eastern Dorset															
Demand Ha	46.9	50.3	53.7	56.3	60.6	65	46.1	49.4	52.8	44.8	48	51.2	194.1	208.4	222.7
Cumulative Supply Ha	82.6	82.6	82.6	127.9	124.5	121.1	134	126.3	118.5	126.7	115.7	104.5	276	276	276
Cumulative Balance Ha	35.7	32.3	28.9	71.6	63.9	56.1	87.9	76.9	65.7	81.9	67.6	53.3	81.9	67.6	53.3
Western Dorset															
Demand Ha	13.8	14.7	15.6	16.7	17.9	19.1	11	11.7	12.3	8.6	9	9.4	50.2	53.3	56.4
Cumulative Supply Ha	17.3	17.3	17.3	20.8	19.9	19	18.8	16.7	14.6	22.5	19.7	17	64	64	64
Cumulative Balance Ha	3.5	2.6	1.7	4.1	2	-0.1	7.8	5	2.3	13.8	10.7	7.6	13.8	10.7	7.6

Table 7.7 Step Change Growth Scenario - Demand and Supply Balance (Land Supply Scenario 1)

	2013 - 2018			2018 - 2023			2023 - 2028			2028 - 33			Total: 2013 - 2033		
Dorset LEP Area	**Base**	**10%**	**20%**	**Base**	**10%**	**20%**	**Base**	**10%**	**20%**	**Base**	**10%**	**20%**	**Base**	**10%**	**20%**
Demand (Ha)	60.7	65.1	69.4	73	78.5	84.1	57.2	61.1	65.1	53.4	57	60.6	244.3	261.7	279.1
Cumulative Supply Ha	99.9	99.9	99.9	156.7	152.3	148	184.8	174.9	165	206.1	192.3	178.4	397	397	397
Cumulative Balance Ha	39.2	34.8	30.5	83.7	73.8	63.9	127.6	113.8	99.9	152.7	135.3	117.9	152.7	135.3	117.9
Eastern Dorset															
Demand (Ha)	46.9	50.3	53.7	56.3	60.6	65	46.1	49.4	52.8	44.8	48	51.2	194.1	208.4	222.7
Cumulative Supply Ha	82.6	82.6	82.6	135.9	132.5	129.1	166	158.3	150.5	183.7	172.7	161.5	333	333	333
Cumulative Balance Ha	35.7	32.3	28.9	79.6	71.9	64.1	119.9	108.9	97.7	138.9	124.6	110.3	138.9	124.6	110.3
Western Dorset															
Demand (Ha)	13.8	14.7	15.6	16.7	17.9	19.1	11	11.7	12.3	8.6	9	9.4	50.2	53.3	56.4
Cumulative Supply Ha	17.3	17.3	17.3	20.8	19.9	19	18.8	16.7	14.6	22.5	19.7	17	64	64	64
Cumulative Balance Ha	3.5	2.6	1.7	4.1	2	-0.1	7.8	5	2.3	13.8	10.7	7.6	13.8	10.7	7.6

Table 7.8 Step Change Growth Scenario - Demand and Supply Balance (Land Supply Scenario 2)

7.18 In Eastern Dorset, employment land projections are then based on current adopted Local Plan housing trajectories (as of April 2016) to the point at which it is anticipated revised Local Plans will be in place. In Eastern Dorset revised Local Plans are anticipated to be in place by April 2019 in Bournemouth, Christchurch & East Dorset and by 2018 in Poole, Purbeck and North Dorset. From this point onwards, the full OAN housing from the Eastern Dorset 2015 SHMA are applied. In Western Dorset, the current adopted Local Plan housing figures have been applied (which are based on the OAN requirements from the 2014 Western Dorset SHMA) with a small increase in housing above the Planned Growth Scenario for the years 2029/30, 2030/31 to take account of a slight increase in housing in Dorchester and Sherborne.

7.19 Overall employment land demand for the Dorset LEP area is 244.3ha (Baseline), 261.7ha (10% Flexibility) and 279.1ha (20% Flexibility) which is easily met by an employment land supply of 340 ha (currently available to the market). For the higher end scenario at 20% flexibility this gives a surplus in land supply of 60.9ha. With the Employment Land Scenario 2 there is an additional 57ha of land supply in Eastern Dorset which provides an additional surplus of land.

7.20 In Eastern Dorset there is a demand for 194.1ha (Baseline), 208.4ha (10% flexibility) and 222.7ha (20% flexibility) which is balanced by an employment land supply of 276ha and gives an overall surplus in employment land supply of 53.3ha in relation to the 20% flexibility scenario. With the Employment Land Scenario 2 there is an additional 57ha of land supply in Eastern Dorset which provides an additional surplus of land.

7.21 In Western Dorset there is demand for 50.2ha (Baseline), 53.3ha (10% Flexibility) and 56.4ha (20% flexibility) which is balanced against an employment land supply of 64ha, which provides a surplus in employment land supply of 7.6ha for the 20% flexibility scenario.

8 Summary and Recommendations

8.1 This chapter examines the 4 growth scenarios that have been tested through the Workspace Strategy and provides recommendations regarding what is considered the most appropriate scenario to take forward across the Dorset LEP area and through Local Plans. An assessment has also been undertaken regarding how demand for employment land balances against existing and planned employment land supply across the Dorset LEP area (including the Eastern and Western Dorset HMAs). This examines the extent to which the existing and planned provision of employment land meets the needs of the market to 2033 in providing sufficient quantity and choice of employment land of the right type and in the right location and which is suitably available to the market. This takes into consideration how the needs of the market will be be met within the HMAs and within the market centres for office and industrial that have been identified through the study.

8.2 The Workspace Strategy is a shared evidence study that has been prepared jointly by the local authorities of Bournemouth, Dorset and Poole in association with the Dorset LEP. The outputs of this study will be crucial in informing the review of the Dorset SEP, informal strategic planning undertaken between Dorset authorities, Local Plans and Employment Land Reviews. In this respect, It is important that there is consistency of approach in terms of the growth scenario applied across the Dorset LEP area and the HMAs. The informal strategic planning process and discussions between local authorities undertaken in accordance with the Duty to Co-operate will inform the future distribution of employment land across the Dorset LEP area. This will help to ensure the delivery of sufficient employment land and premises of the right type and in the right location to meet the future needs of the economy for the Dorset LEP area including the Eastern and Western Dorset HMAs to 2033.

EMPLOYMENT LAND DEMAND

8.3 The Workspace Strategy has tested 4 growth scenarios which assess future employment land requirements in relation to current planned housing growth in adopted Local Plans and also the full objectively assessed housing needs identified in the 2014 and 2015 SHMAs for Western and Eastern Dorset. Each of the growth scenarios includes a baseline level employment land projection and two further scenarios with 10% and 20% flexibility over and above the baseline projection. The purpose of these additional scenarios is to provide flexibility over and above the baseline projection to provide a choice to the market in terms of the range and types of sites on offer to respond better to market requirements. Previous workspace studies have also tested 10% and 20% over and above baseline projection requirements to provide flexibility to the market and the Dorset LEP local authorities have previously applied 10% or 20% flexibility rates through Local Plans dependant on local requirements.

8.4 In the Dorset LEP area and the Eastern Dorset HMA 70% of demand is for industrial uses including B1c, B2 and B8 use classes and 30% of demand is for B1 office over the study period 2013 - 2033. The split in demand is slightly different for Western Dorset with 78% of demand for industrial uses including B1c, B2 and B8 use classes and 22% of demand for office uses over the study period.

8.5 An assessment of the growth scenarios is set out below including the reasoning behind their inclusion in the study, employment projection figures for each scenario and recommendations for application of scenarios in Local Plans.

8.6 **Trend Scenario:**

8.7 This baseline scenario is based on the 2011 Census of Population workplace based employment data by district,unitary authority and by industrial sector. Employment growth rates from the Cambridge Econometrics LEFM for Dorset (2015) have then been applied with some adjustments for local knowledge, particularly in sectors showing stronger growth than would be expected in Dorset. The growth rate for this scenario is 2.2% GVA per annum for the Dorset LEP area. This scenario identifies the following projections for employment land:

- **Bournemouth, Dorset and Poole: 170.5ha (Baseline), 180.5ha (10% Flexibility), 190.5ha (20% Flexibility).**
- **Eastern Dorset: 140.7ha (Baseline), 149.6ha (10% Flexibility), 158.5ha (20% Flexibility).**
- **Western Dorset: 29.8ha, 30.9ha (10% Flexibility), 32ha (20% Flexibility).**

8.8 **Scenario Assessment & Recommendation:**

8.9 This scenario has been included as it sets out the baseline employment land projection derived from the Cambridge Econometrics LEFM and reflects the continuation of past trends of employment growth before the impact of local housing growth is considered. It is not considered appropriate to take forward this scenario as it does not take into account the impact of housing growth which is a requirement set out in national planning guidance. As this scenario projects forward past trends it could also be considered not to be aspirational as it doesn't reflect a potential step change in the local economy.

8.10 **Planned Growth Scenario:** The baseline for this scenario is the 2011 Census of Population workplace based employment data by district / unitary authority and by industrial sector. The housing data is based on current adopted Local Plan housing trajectories (as of April 2016) until the end of the current respective Local Plan periods. Beyond the end of current Local Plan periods the average objectively assessed needs (OAN) are applied from the 2014, 2015 SHMAs to 2033. The growth rate for this scenario is 2.3% GVA per annum for the Dorset LEP area. This scenario identifies the following projections for employment land:

e. **Bournemouth, Dorset and Poole: 222.4ha (Baseline), 237.6ha (10% Flexibility), 252.8ha (20% Flexibility).**

f. **Eastern Dorset: 172.7ha (Baseline), 184.8ha (10% Flexibility), 196.9ha (20% Flexibility).**

g. **Western Dorset: 49.7ha (Baseline), 52.8ha (10% Flexibility), 55.9ha (20% Flexibility).**

8.11 <u>Scenario Assessment & Recommendation:</u>

8.12 This scenario is useful in setting out the impact of current adopted Local Plans and housing targets, however paragraph 47 of the NPPF sets out a requirement to ensure that Local Plans meet the full, objectively assessed needs for market and affordable housing in the HMA as far as it is consistent with the policies set out in the NPPF. Moving forward and in consideration of Local Plan reviews it is not considered appropriate to adopt this scenario across the Dorset LEP area as it doesn't reflect the impact of the full OAN from the Eastern Dorset SHMA and would not be NPPF compliant.

8.13 <u>Accelerated Growth Scenario:</u> The baseline for this scenario is the 2011 Census of Population workplace based employment data by district / unitary authority and by industrial sector. In Eastern Dorset, employment land projections are based on current adopted Local Plan housing trajectories (as of April 2016) to the point at which it is anticipated revised Local Plans will be in place. In Eastern Dorset, revised Local Plans are anticipated to be in place by April 2019 in Bournemouth, Christchurch & East Dorset and by 2018 in Poole, Purbeck and North Dorset. In Eastern Dorset, existing Local Plan figures are applied to the point when revised plans are in place, from this point onwards until 2033 the average objectively assessed needs from the 2015 Eastern Dorset SHMA are applied. In Western Dorset, the current adopted Local Plan housing figures have been applied (which are based on the OAN requirements from the 2014 Western Dorset SHMA) with a small increase in housing above the Planned Growth Scenario for the years 2029/30, 2030/31 to take account of a slight increase in housing in Dorchester and Sherborne. The growth rate for this scenario is 2.4% GVA per annum for the Dorset LEP area. This scenario identifies the following requirements for employment land:

e. **Bournemouth, Dorset and Poole: 233.9ha (Baseline), 250.2ha (10% Flexibility), 266.6ha (20% Flexibility).**

f. **Eastern Dorset: 183.7ha (Baseline), 196.9ha (10% Flexibility), 210.1ha (20% Flexibility).**

g. **Western Dorset: 50.2ha (Baseline), 53.3ha (10% Flexibility), 56.4ha (20% Flexibility).**

8.14 <u>Scenario Assessment & Recommendation:</u>

8.15 It is considered that this scenario is not appropriate to take forward as it doesn't reflect the impact of the full OAN housing need identified in the Eastern Dorset SHMA which is required in order to be NPPF compliant.

8.16 **Step Change Scenario:** The baseline for this scenario is the 2011 Census of Population workplace based employment data by district / unitary authority and by industrial sector. In Eastern Dorset, employment land projections are then based on current adopted Local Plan housing trajectories (as of April 2016) to the point at which it is anticipated revised Local Plans will be in place. In Eastern Dorset revised Local Plans are anticipated to be in place by April 2019 in Bournemouth, Christchurch & East Dorset and by 2018 in Poole, Purbeck and North Dorset. From this point onwards, the full OAN housing from the Eastern Dorset 2015 SHMA are applied. In Western Dorset, the current adopted Local Plan housing figures have been applied (which are based on the OAN requirements from the 2014 Western Dorset SHMA) with a small increase in housing above the Planned Growth Scenario for the years 2029/30, 2030/31 to take account of a slight increase in housing in Dorchester and Sherborne. The growth rate for this scenario is 2.4% GVA per annum for the Dorset LEP area. This scenario identifies the following requirements for employment land:

- **Bournemouth, Dorset and Poole: 244.3ha (Baseline), 261.7ha (10% Flexibility), 279.1ha (20% Flexibility).**
- **Eastern Dorset: 194.1ha (Baseline), 208.4ha (10% Flexibility), 222.7ha (20% Flexibility).**
- **Western Dorset: 50.2ha (Baseline), 53.3ha (10% Flexibility), 56.4ha (20% Flexibility).**

8.17 **Scenario Assessment & Recommendation:**

8.18 This growth scenario is considered appropriate to be applied through Local Plans as it reflects current programmes for Local Plan preparation and the delivery of the full OAN housing need identified in the Eastern and Western Dorset SHMAs (2015, 2014) which is policy compliant with the NPPF. As with the other scenarios set out above, the Step Change Scenario has been tested at Baseline, +10% and +20% for flexibility. In response to previously published workspace studies local authorities across the Dorset LEP area have applied differing percentages for flexibility (both 10% and 20%) over and above the baseline requirement through Local Plans (dependant on local requirements) which have been tested through Examination. It is considered that in response to this Workspace Strategy it is appropriate to adopt the Step Change Scenario with 20% flexibility over and above the baseline projection in order to provide sufficient flexibility in the range and choice of employment sites available to the market. This approach also reflects comments received by commercial property agents in Eastern and Western Dorset who have commented that there needs to be a adequate supply of employment land that is available in the short term and to achieve this, additional employment land supply over and above the baseline requirement may be required. Adopting the 20% flexibility scenario will also help to address any issues in the timing of delivery of land on sites of strategic significance in the Dorset LEP area.

EMPLOYMENT LAND SUPPLY

8.19 The employment land demand scenarios set out above have been balanced against employment land supply in the Dorset LEP area and over 5 year phasing periods from 2013 to 2033. For the purposes of this study the following 2 employment land supply scenarios have been considered:

1. **Employment Land Supply Scenario 1:** This scenario includes current employment land supply which has been identified by the Dorset LEP area local authorities and includes all existing Local Plan employment sites and other employment sites identified through employment land reviews that are available to the market. This has identified the following employment land supply:

   - **Bournemouth, Dorset and Poole - 340ha**
   - **Eastern Dorset - 276ha**
   - **Western Dorset - 64ha**

2. **Employment Land Supply Scenario 2:** This scenario includes the sites identified in Scenario 1 with the addition of further sites currently being considered through Local Plan reviews which have the potential to be formally allocated and form part of the land supply over the study period to 2033. This scenario includes an additional 30ha of land in the Borough of Poole and approximately a further 27ha of land in Purbeck District which reflects option sites currently being considered as part of their Local Plan review process. This has identified the following employment land supply:

   - **Bournemouth, Dorset and Poole - 397ha**
   - **Eastern Dorset - 333ha**
   - **Western Dorset - 64ha**

8.20 For the purposes of this study **Employment Land Supply Scenario 1** is used to draw conclusions regarding the extent to which the demand for employment land is in balance with land supply. This is because the land included in this scenario is considered deliverable over the study period to 2033. **Employment Land Supply Scenario 2** is relevant to consider as it includes some additional sites that may be allocated through Local Plan reviews which will add to the land supply deliverable over the study period.

8.21 Of the total 340ha identified in Employment Land Scenario 1, 100ha of land is available in the short term and developable in the next 2 years and 110ha of land is available in the medium term and is projected to come forward within the next 3-5 years. The remaining 130ha is likely to come forward in the long term in over 5 years' time. This phasing of land availability is based on current assessments of the period of time for a site to be developed. There is potential for a higher rate of development to come forward in the short to medium term dependant on a range of factors including market demand, land owners bringing sites forward and the phasing of key infrastructure improvements.

8.22 In Eastern Dorset there is an employment land supply of 276ha which constitutes over 80% of the total available employment land for Eastern and Western Dorset. Of the 276ha available in Eastern Dorset, 83ha (30%) is projected to come forward in the short term (0-2 years), 92ha (33%) in the medium term (3-5 years) and 101 ha (37%) in the long term (5 Years +).

8.23 In Western Dorset there is an employment land supply of 64ha which constitutes 19% of the total available employment land supply for Eastern and Western Dorset. Of the 64ha available in Western Dorset, 17ha (27%) of land is projected to come forward in the short term (0-2 years), 17ha (27%) in the medium term (3-5 years) and 29ha (46%) in the long term (5 Years +).

8.24 Across Eastern and Western Dorset, there are 9 very large employment sites (10ha +) which account for 170ha (50%) of the total employment land supply. Eight of the 9 sites are located in Eastern Dorset and account for 158ha (46%) of total employment land supply. There are 21 large sites (2 - 9.99 ha) in Eastern and Western Dorset which accounts for 114ha (33%) of total available employment land supply. Of this 114ha, 76ha is located in Eastern Dorset and accounts for 22% of total available employment land. There are 69 sites below 2ha which account for 56ha (16%) of total available employment land in Eastern and Western Dorset.

8.25 The sites that comprise the 340ha of employment land are considered to be deliverable over the study period to 2033. A programme of highways improvements has been identified for the B3073 corridor that will facilitate further growth at Bournemouth Airport Business Park (and housing growth in the wider area) and has received funding support through the Growth Deal. The full development potential of the Airport Business Park had not been included in the previous Workspace Study due to highways infrastructure constraints.

8.26 Dorset Green Technology Park has recently received Enterprise Zone status and now includes over 50 ha of land, of which 30 - 40ha of land may currently be developed over the study period to 2033.

BALANCING DEMAND AND SUPPLY

8.27 Over the study period from 2013 - 33 and across all the growth scenarios there is an overall balance between the demand and supply of employment land. At the higher end the **Step Change Scenario with 20% flexibility** identifies an employment land projected requirement of 279ha for the Dorset LEP area which is balanced against a land supply of 340ha (**Employment Land Supply Scenario 1** / land currently available to the market). In this scenario there is a 60.9ha surplus in supply over and above this projected requirement for the Dorset LEP area. This Step Change Scenario also identifies a projected requirement of 222.7ha for

Eastern Dorset which is balanced against an employment land supply of 276ha for this HMA, which gives 53.3ha surplus supply over and above the projected requirement. In Western Dorset this scenario identifies a projected requirement of 56.4ha which is balanced against a land supply of 64ha which provides a surplus in supply of 7.6ha over and above the projected requirement.

8.28 Through Local Plan reviews there may be further employment land that will come forward through Employment Land Supply Scenario 2 which currently includes an additional supply of approximately 57ha in Eastern Dorset through sites considered in the Borough of Poole and Purbeck Local Plan reviews.

8.29 Eighty percent of demand for employment land is within Eastern Dorset and 20% in Western Dorset which corresponds with approximately 80% of employment land supply located in Eastern Dorset and 20% of supply located in Western Dorset. Although employment land demand and supply is in balance with some surplus for the Dorset LEP area and Eastern and Western Dorset, it is important that employment land is delivered commensurate with the commercial property market areas and centres for office and industrial uses.

8.30 The main market centres for office are located in Eastern Dorset with the primary office centres in Bournemouth and Poole and supporting roles performed by Bournemouth Airport Business Park and Ferndown Industrial Estate. In meeting the increased demand for office accommodation (30% of overall demand) over the study period to 2033 it is important that there are not significant losses in the existing stock of office accommodation, particularly in Bournemouth and Poole and there needs to be sufficient capacity to meet future needs within these areas with support from other business parks in Eastern Dorset. It is currently considered there is sufficient capacity in Eastern Dorset to meet future office demands for this HMA but this is dependant on minimising any net loss of employment land suitable to meet market requirements for office use.

8.31 The main market centres for industrial development are predominantly located in Eastern Dorset with strategic business parks located in the Borough of Poole, Christchurch, East Dorset, Purbeck, Bournemouth and North Dorset. There is currently adequate employment land supply in Eastern Dorset to meet current and projected market requirements for industrial development in relation to the Step Change growth scenario with 20% Flexibility. This provides a sufficient range and choice of sites which are suitably available to meet market requirements in the short term within this HMA.

8.32 In the Western Dorset HMA 78% of future demand is for industrial uses and 22% of demand is for office uses over the study period. Twenty percent of future employment land demand for the Dorset LEP area is within Western Dorset (56.4ha, Step Change, 20%). Western Dorset also contains the Granby Industrial Estate in Weymouth which is also a key industrial centre for the Dorset LEP area. It is considered that the current employment land supply of 64ha provides a sufficient quantity of land in the right location and appropriate availability to meet future requirements over the study period to 2033.

Appendix A Available Sites

Local Authority	Address	Available Land (ha)	Phasing of Availability
Bournemouth	Ashley Road Coal Yard	1.11	Medium Term
Bournemouth	Castle Lane East (Deansleigh Road)	0.93	Medium Term
Bournemouth	Castle Lane East (Riverside Avenue)	6.01	Medium Term
Bournemouth	Lansdowne (A - St Paul's)	0.78	Short Term
Bournemouth	Lansdowne (B - Oxford Road/Holdenhurst Road)	0.59	Medium Term
Bournemouth	Lansdowne (C - Cotlands)	1.41	Short / Medium Term
Bournemouth	Poole Lane	1.46	Long Term
Bournemouth	Wallisdown Road B (Proctor and Gamble)	3.37	Long Term
Bournemouth	Wellington Road, Royal Mail Delivery Office	0.28	Long Term
Bournemouth	Yeomans Road	0.12	Long Term
Christchurch	Aviation Park West	34	Short / Medium / Long Term
Christchurch	Aviation Park East	20	Short / Medium / Long Term
Christchurch	Cimex International (Somerford Road / Wilverley Road)	1.8	Short Term
Christchurch	Gaswork Site (Bridge Street)	1.5	Short / Medium Term
Christchurch	Stony Lane	1.7	Short / Medium Term

Available Sites

Local Authority	Address	Available Land (ha)	Phasing of Availability
Christchurch	Fairmile Road / Vacant land at Avon Trading Park	0.7	Short Term
Christchurch	Grange Road Depot	0.6	Short Term
Christchurch	Baptist Church Site (Airfield Way)	0.5	Short Term
Christchurch	Bournemouth & West Hants Water (Located at Avon Trading Park)	0.7	Short Term
East Dorset	Ebblake	0.79	Short Term
East Dorset	Brook Road (Flight's North Area)	1.98	Short Term
East Dorset	East of Cobham Road, Ferndown	8.43	Short Term
East Dorset	Blunts Farm Employment Allocation	30	Short / Medium / Long Term
East Dorset	Woolsbridge Employment Allocation	13.1	Short / Medium Term
East Dorset	Bailie Gate Employment Allocation	3.3	Short / Medium Term
North Dorset	The Brewery & Stour Park	1.28	Long Term
North Dorset	Brickfields Business Park, Gillingham	9	Medium / Long Term
North Dorset	CB Morgan Ltd	0.729	Short Term
North Dorset	North Dorset Business Park	4.4	Short / Medium / Long Term
North Dorset	Shaftesbury Lane, Blandford	1.12	Short / Medium Term
North Dorset	Peacemarsh	2.66	Medium / Long Term

Local Authority	Address	Available Land (ha)	Phasing of Availability
North Dorset	Park Farm	1.7	Medium Term
North Dorset	Poultry Houses Okeford Fitzpaine	2.89	Long Term
North Dorset	South of A30	6.2	Short / Medium / Long Term
Poole	Former BG site, Yarmouth Road	0.10	Short Term
Poole	Banbury Road, Nuffield Industrial Estate	1.39	Medium Term
Poole	Sterte Avenue West, Sterte	4.78	Short / Medium Term
Poole	Area 2, Ling Road, Mannings Heath	1.72	Short Term
Poole	Former BT site, Yarrow Road	2.20	Short Term
Poole	Land at Yarrow Road, Mannings Heath	1.56	Medium Term
Poole	Land at Aston Way, Mannings Heath	0.56	Short Term
Poole	Land at Witney Road, Nuffield Industrial Estate	0.40	Medium Term
Poole	Land at Vantage Way, Mannings Heath	1.36	Short Term
Poole	Land south-west of Mannings Heath Road	0.46	Short Term
Poole	Land adjacent to 60-62 Dawkins Road, Hamworthy	0.12	Short Term
Poole	Land at Lifeboat Quay	0.46	Medium Term
Poole	Land between Wilkins Way & RNLI	6.66	Short / Medium / Long Term

Available Sites

Local Authority	Address	Available Land (ha)	Phasing of Availability
Poole	Land between Poole Bridge & Wilkins Way		
Poole	Sydenhams Timber Yard		
Poole	Fleets Corner	1.00	Short / Medium Term
Poole	Former Siemens site, Sopers Lane	3.94	Short / Medium Term
Poole	Land at Sembcorp Bournemouth Water, Francis Avenue	1.46	Short Term
Poole	The Goods Yard	0.77	Medium Term
Poole	Poole Port	4.50	Medium Term
Poole	Land at Sterte Avenue West, Sterte	0.47	Short Term
Poole	79a Sterte Avenue West, Sterte	0.56	Short Term
Poole	Sigma-Aldrich site, Fancy Road	0.98	Short Term
Poole	Magna Business Park, Magna Road	4.89	Short Term
Poole	Magna Business Park, Magna Road	10.00	Medium / Long Term
Poole	Poole Port	4.50	Short Term
Poole	Highmoor Farm Digital Village, Talbot Village, Wallisdown	11.50	Medium / Long Term
Purbeck	Former Milk Depot, Corfe Castle	0.4	Short / Medium Term
Purbeck	Holton Heath Industrial Estate, Holton Heath	5	Short Term

Local Authority	Address	Available Land (ha)	Phasing of Availability
Purbeck	Romany Works	1	Medium / Long Term
Purbeck	Johns Road, Wareham	0.3	Medium Term
Purbeck	Admirality Park	2	Short / Medium Term
Purbeck	Prospect Business Park	0.67	Short / Medium Term
Purbeck	Sandford Lane, Wareham	2.48	Short / Medium Term
Purbeck	Dorset Green Technology Park	30	Short / Medium / Long Term
Purbeck	Bere Regis (north site)	2	Medium Term
West Dorset	Horn Park Quarry, Beaminster	0.1	Short Term
West Dorset	Land at Lane End, Beaminster	0.7	Short / Medium / Long Term
West Dorset	Broadwindsor Road, Beaminster	0.5	Short Term
West Dorset	St Andrews Trading Estate, Bridport	0.2	Long Term
West Dorset	Crepe Farm Business Park, Bridport	0.2	Short Term
West Dorset	Gore Cross, Bridport	0.5	Short Term
West Dorset	North Mills Trading Estate, Bridport	0.3	Short / Medium / Long Term
West Dorset	Pymore Mills, Bridport, Pymore	0.4	Long Term
West Dorset	Charminster Farm, Charminster	0.2	Long Term

Available Sites

Local Authority	Address	Available Land (ha)	Phasing of Availability
West Dorset	Railway Triangle Industrial Estate, Dorchester	0.53	Short / Medium / Long Term
West Dorset	Coldharbour Business Park, Sherborne	0.06	Long Term
West Dorset	Marabout/The Grove Industrial Estate, Dorchester	0.30	Long Term
West Dorset	Uplyme Road Business Park, Lyme Regis	0.15	Long Term
West Dorset	Land at Icen and Weyside Farms	1.30	Short / Medium / Long Term
West Dorset	Land at Sherborne Hotel	0.98	Short Term
West Dorset	Poundbury Parkway Farm Business Site Extension	0.90	Short Term
West Dorset	Parkway Farm Business Park, Dorchester	1.20	Short Term
West Dorset	Land to the North of Broadwindsor Road	0.50	Short Term
West Dorset	Land at Barton Farm	3.50	Short / Medium / Long Term
West Dorset	Poundbury Mixed Use Development	6.0	Short / Medium / Long Term
West Dorset	Land at Putton Lane	0.70	Short Term
West Dorset	Land at Vearse Farm	4.00	Long Term
West Dorset	Charles Street	1	Short Term
West Dorset	Land at Crossways	3.5	Long Term
West Dorset	Red Cow Farm, St George's Road	0.18	Short Term

Local Authority	Address	Available Land (ha)	Phasing of Availability
Weymouth and Portland	Granby Industrial Estate, Chickerell	1.7	Short Term
Weymouth and Portland	Link Park, Chickerell	2.8	Short Term
Weymouth and Portland	Lynch Lane Industrial Estate, Chickerell	0.08	Long Term
Weymouth and Portland	Inmosthay Industrial Estate, Portland	0.10	Long Term
Weymouth and Portland	Tradecroft Industrial Estate, Portland	1.30	Long Term
Weymouth and Portland	Mount Pleasant Business Park, Weymouth	6.30	Short / Medium / Long Term
Weymouth and Portland	Portland Port, Portland	3.00	Short Term
Weymouth and Portland	Littlemoor Urban Extension	12.0	Short / Medium / Long Term
Weymouth and Portland	Osprey Quay	8.80	Short / Medium / Long Term
Total:		**340**	

Table A.1 Available Sites

Appendix B Local Plan Employment Policies

<u>**Bournemouth Borough Council**</u>
<u>***Policy CS8 Lansdowne Employment Area***</u> Within the boundary of the Lansdowne Employment Area development, including redevelopment or conversion, will be required to provide principally Use Class B1 (Business) space or tertiary teaching development. Other uses that form an element of a principally Use Class B1 (Business), or tertiary teaching, led mixed use scheme will also be acceptable, providing the function and integrity of the principal uses are not compromised, in the following order of preference: • other employment generating uses that can be demonstrated to generate significant employment opportunities; • small scale retail and other commercial uses only where such a use forms a ground floor only, incidental element, of a mixed use development; • residential or student accommodation only where it forms a subsidiary part of a principally Use Class B1 (Business) or tertiary teaching led scheme and it can be demonstrated that such a use is required to ensure the viability and deliverability of the mixed use scheme; and opportunities in other employment generating uses have been thoroughly investigated and marketed and can be shown not to be viable. <u>***Policy CS26 Protecting Allocated Employment Sites:***</u> *Proposals for development in the allocated employment areas, as shown on the proposals map, that would result in the loss of sites or premises used, or last used, within Use Classes B1, B2 or B8 will not be permitted.* *New development on the allocated employment sites should provide a use within Use Classes B1, B2 or B8. Exceptionally, other employment development outside these Use Classes will be considered provided that they do not compromise the activities or integrity of the employment area and:* • *it can be demonstrated that there is no longer a need for the current employment use and the land and/or premises has been sufficiently and realistically marketed for Use Class B1, B2 and B8 uses for a period of at least 12 months;* • *the principal activity is not retail in nature;*

- *there is a lack of suitable alternative sites, other than in existing employment areas for the type of employment activity proposed; and*
- *the loss of the site to non-Use Class B1, B2 or B8 uses would not prejudice the long term employment requirements of the Borough.*

Policy CS27 Protecting Unallocated Employment Sites:

Development resulting in the loss of sites or premises used, or last used, within Use Classes B1, B2 or B8 outside the allocated employment sites will not be permitted unless it can be demonstrated that either:

- *the current use causes environmental problems; or*
- *the location of the premises is no longer suitable for employment use.*

Replacement uses will favour other employment generating uses prior to sites being considered for residential development. Prior to other non-employment uses being considered it must be demonstrated that an employment use is not forthcoming and the land and/or premises has been sufficiently and realistically marketed for a minimum of 12 months.

Borough of Poole

PCS 2 - EXISTING EMPLOYMENT AREAS:

Land and premises within Poole's existing employment areas will be reserved for uses which generate employment, and which are appropriate to the location as a consequence of:

i. the principal activity falling within Use Classes B1, B2 or B8;

ii. their need to be in the employment area in question, due to close associations with neighbouring businesses;

iii. their potential to have an adverse impact in more sensitive locations such as residential areas; or

iv. a lack of suitable alternative sites, other than in existing employment areas, for the type of employment activity proposed.

In all cases proposals will only be permitted where they do not compromise the activities of the employment area or conflict with other policy objectives in the Local Development Framework.

The Core Strategy sets out the following policy approach for the consideration of proposals for non-employment uses on isolated employment sites located outside the core existing employment areas.

PCS 4 - ISOLATED EMPLOYMENT SITES:

For sites currently or previously used for activities falling within Use Classes B1, B2 or B8 of the Use Classes Order 1987 (as amended) which are located outside of existing employment areas, alternative uses to B1, B2 or B8 will only be considered if the site is no longer suitable or viable for continued employment use and the cost of refurbishment or redevelopment for a more appropriate form of employment use would be prohibitive. Where these exceptional circumstances apply, the Local Planning Authority will first seek to secure the provision of small starter business units as part of a comprehensive mixed use scheme before it considers single-use developments. Priority will then be given to alternative uses in the following sequence:

i. health or care-related uses, including care homes and specialist health facilities, where the site is suitably accessible for the use proposed;

ii. other uses which generate employment; and

iii. residential development, where the site offers an acceptable environment.

Christchurch and East Dorset Councils

Policy KS5

Provision of Employment Land

Employment land supply located in Christchurch and East Dorset will contribute in part to meeting the wider strategic requirement across the Bournemouth and Poole Strategically Significant City and Town as identified in the 2012 Bournemouth, Dorset and Poole Workspace Study. 80 hectares of land will be identified to meet the requirements of existing and new businesses. An appropriate mix of premises will be encouraged on employment sites within the portfolio to meet these business needs. Live/work units will be supported for business activity that is acceptable in environmental terms (noise, discharges or emissions to land, air or water) and that will not affect the health, safety or amenities of nearby land.

Policy BA1

Vision for Bournemouth Airport

Bournemouth Airport will develop as a flagship regional airport serving Christchurch and the South East Dorset sub-region. It will enhance its passenger facilities, provide new services for business and leisure travellers and develop as an aviation and local transport hub.The northern business parks will be redeveloped to provide a range of employment land and premises to serve the local and sub-regional economy. This will include the potential to attract new business sectors in knowledge based industries and other growth sectors to increase opportunities for higher skilled employment and to stimulate economic growth. The business parks will utilise their extensive high quality airside access, to encourage further growth in the aviation and aviation related business sectors.

Development of the airport and business park will incorporate low carbon and energy efficiency measures in accordance with national policy and Policy ME3 of the Core Strategy. New development will also utilise energy from decentralised, renewable and low carbon sources in accordance with Policy ME4.

Growth of the operational airport and business park will be achieved acknowledging and respecting the environmental constraints which exist around the airport, and in consideration of possible impacts on the New Forest National Park and statutory park purposes.

***Flood risk:** (As shown in the Level 2 Strategic Flood Risk Assessment (2009): Strategic measures will be put in place within the airport boundary including flood storage and associated watercourse improvements. Future development will take account of surface water flooding and adopt a sequential approach toward the location of development within the site.*

***Emissions from air traffic / road traffic:** In relation to airport and business park growth, mitigation measures include implementation of the airport area wide travel plan, landscaping and strategic tree planting as required by the 2007 terminal consent.*

***Environmental Designations:** Growth of the airport and business park will seek positive improvements in the extent and quality of priority habitats and the populations of priority species and shall conserve ecological network connections. The provision of off-site infrastructure shall meet the requirements of Policy ME1 and seek to avoid the fragmentation of priority habitats, priority species populations and ecological network connections. Where the need for development outweighs policy protection of the natural environment, measures will be provided to mitigate or compensate any harm.*

***Highway Capacity / Sustainable Transport:** Online junction improvements are required along the B3073 to facilitate growth of the operational airport, business park and development in the wider area. These junction improvements and improvements in public transport and cycle access are set out in the Key Strategy Policy KS9 and Policy KS10 and in Local Transport Plan 3. Delivery of these improvements will be facilitated* *by appropriate contributions from airport development and development in the wider area. Successful implementation of the airport's area wide travel plan is required to help facilitate sustainable access to the airport and business park.*

Policy BA2

Strategy for the Operational Airport:

New passenger departure and arrivals terminal facilities for the operational airport were completed in 2011 to support projected growth to 3 million passengers per annum by 2030. Associated infrastructure will be developed to support the operational airport informed by the adopted Bournemouth Airport Master Plan (May 2007) to include:

- *Further administrative accommodation for airlines, handling agents, tour operators, the airport authorities and government agencies.*
- *Airside airport related retail and catering facilities.*
- *Public and staff car parking.*
- *Public transport facilities and enhanced services in accordance with airport travel plan.*
- *Other facilities for general aviation.*
- *Cargo facilities, including bonded warehousing and associated infrastructure.*

Associated facilities to enhance the services offered by the airport may also be permitted subject to consideration of their impact on other Core Strategy policies, including:

- *Development of hotel accommodation.*
- *Training centres for airlines and related services.*
- *Petrol filling stations.*
- *Aviation maintenance facilities.*

To enable development of these airport operational improvements, the Core Strategy will implement recommendations of national airports policy by removing sufficient further land within the airport boundary from the South East Dorset Green Belt (see Policy BA3 below). The Council will work with the airport to support the development of new routes and services to business and leisure destinations which will meet the needs of local businesses and communities.

Strategy for the Airport Northern Business Parks:

The northern business parks comprising the north west and north east sectors contain 80ha of land of which approximately 60ha is available for development. The business parks are allocated primarily for employment uses (B1, B2 and B8). Non B class employment uses which create high quality employment opportunities and contribute to raising levels of economic productivity will also be supported.

Aviation uses which require airside access will have preference for airside locations, other employment uses including B1, B1c, B2 and B8 uses can be successfully co-located across

the business parks.

Non employment uses ancillary to the core employment functions and sufficient to meet the needs of the working population of the northern business park may include:

- *Convenience retail*
- *Restaurant*
- *Banking*
- *Amenity space*
- *Conference and leisure facilities.*

The phasing of future employment development in the airport northern business parks will be in line with the necessary improvements required to the highway network to facilitate development. Over the plan period to 2028 it is envisaged that up to 30ha of new employment development may come forward across the north west and north east business parks. Economic assessments identify the following sectors with significant requirements for land and premises at the airport.

- *General manufacturing*
- *Advanced engineering*
- *Financial and business services*
- *ICT*
- *Distribution / Logistics*

The following types of premises are required to support this sector activity:

- *Small business units / industrial (B1c, B2 predominantly)*
- *Larger business units/ industrial*
- *Small purpose built office units*
- *Warehousing*

- *Start-up incubator premises*
- *Recycling / environmental industries*

<u>Policy PC1</u>

<u>Christchurch and East Dorset Employment Land Hierarchy:</u>

The following site hierarchy is proposed to influence the location of employment uses across sites in Christchurch and East Dorset. 'Higher order' uses that are economically productive offering highly skilled and well paid employment will be located on 'Strategic Higher Quality' and 'Higher Quality' sites which offer the necessary locational attributes. A more flexible approach toward employment uses will be adopted towards other employment sites in the Christchurch and East Dorset hierarchy.

The following sites are considered to be 'higher quality' and offer the necessary locational attributes to attract 'higher order' uses. These sites will be the focus for meeting projected requirements for B1 (Office and Light Industrial uses), B2 (General Industry) and B8 (Warehousing and Distribution) uses as set out in Key Strategy Policy KS5. Strategic and higher quality sites set out below will be protected for employment uses within B1, B2 and B8. On these sites employment activity within non B use class (other employment generating uses) will only be considered where it makes a significant contribution to raising levels of productivity and offers skilled employment opportunities. Non employment uses ancillary to core employment functions will be considered on 'Strategic Higher Quality' Sites where such facilities are required to meet the needs of workers.

Strategic Higher Quality Sites

- *Bournemouth Airport Northern Business Park (North West and North East Sectors), Christchurch.*

Other Higher Quality Sites

- *The BAE site, Grange Road*
- *Christchurch Business Park*
- *Priory Industrial Park*
- *Sites located directly off Airfield Way, Airfield Road, and Wilverley Road including:*
- *Silver Business Park*
- *Airfield Industrial Estate*
- *Ambassador Industrial Estate*
- *Beaver Industrial Estate*
- *Sea Vixen Industrial Estate*

- *Somerford Business Park*
- *Hughes Business Centre*

The following sites will also be a focus for meeting projected requirements for B1 (Office and Light Industrial uses), B2 (General Industry) and B8 (Warehousing and Distribution) uses as set out in Key Strategy Policy KS5. Employment uses within B1, B2 and B8 use classes will be protected in accordance with Policy PC2. A more flexible approach will be adopted for the following sites where B1, B2 and B8 uses will be accommodated in addition to a more diverse range of non B employment uses, as well as non employment uses ancillary to core employment functions:

- *Avon Trading Park, Christchurch*
- *Stony Lane South including the Gasworks Site, Christchurch*
- *Groveley Road, Christchurch*
- *Somerford Road, Christchurch*
- *Brook Road Industrial Estate, Wimborne, East Dorset*
- *Gundrymoor Industrial Estate, West Moors, East Dorset*
- *Riverside Park Industrial Estate, Wimborne, East Dorset*
- *Uddens Industrial Estate, Ferndown, East Dorset*
- *Ferndown Industrial Estate, East Dorset*
- *Woolsbridge Industrial Estate, Three Legged Cross, East Dorset*
- *Ebblake Industrial Estate, Verwood, East Dorset*
- *Bailie Gate Industrial Estate, Sturminster Marshall, East Dorset*

The following sites have been identified for upgrading:

- *Bournemouth Airport Northern Business Park (North West and North East Sectors), Christchurch*
  - *In order to realise its potential for attracting business activity this site will require 'upgrading' to ensure it offers the necessary locational site attributes. This will include improvements in transport infrastructure, flood risk management infrastructure, on site environmental improvements and the delivery of new employment units to meet market requirements.*
- *Sites located directly off Airfield Way, Airfield Road, and Wilverley Road as set out above.*

The upgrading of these sites will involve the provision of an enhanced range of higher quality employment premises to meet market requirements and to attract a more diverse range of business activity to the Borough. This may also include business park environmental enhancements and improvements to broadband infrastructure. Transport infrastructure improvements will be delivered on Stony Lane, Christchurch, as identified in the Key Strategy Policy KS10.

Policy PC2:

Alternative Uses for Employment Land Where Justified by Market Evidence

Where there is strong evidence of the lack of market demand over the plan period (2013 – 2028) employment land may be considered for non B use classes. High quality mixed use schemes may also be considered to ensure a site can be brought forward for development.

Policy PC4

The Rural Economy

Although economic development will be strictly controlled in open countryside away from existing settlements, in order to promote sustainable economic growth in the rural area, applications for economic development will be encouraged where development is located in or on the edge of existing settlements where employment, housing, services and other facilities can be provided close together. Such proposals should be small scale to reflect the rural character. Proposals for the conversion and re-use of appropriately located and suitably constructed existing buildings in the countryside for economic development, including tourist related uses, must ensure:

- *The proposal supports the vitality and viability of rural service centres and villages with existing facilities.*
- *Proposals must not adversely impact the supply of employment sites and premises and the economic, social and environmental sustainability of the area, when considering proposals which involve the loss of economic activity.*
- *Proposals do not have a materially greater impact on the openness of the Green Belt and the purpose of including land within it.*
- *The benefits outweigh the harm in terms of:*

1. The potential impact on countryside, landscapes and wildlife.

2. Development is compatible with the pursuit of the Cranborne Chase and West Wiltshire

Downs Area of Outstanding Natural Beauty (AONB) purposes, which are set out in the

AONB Management Plan.

3. Local economic and social needs and opportunities not met elsewhere.

4. Settlement patterns and the level of accessibility to service centres, markets and housing.

5. The building is suitable for the proposed use without major re-building and would not require any significant alteration which would damage its fabric and character, or detract from the local characteristics and landscape quality of the area. Any necessary car parking provision should also not have an adverse impact on the setting of the building in the open countryside.

6. The preservation of buildings of historic or architectural importance/interest, or which otherwise contributes to local character.

Proposals for the development and diversification of agricultural and other land-based rural businesses will be supported which meet the criteria set out in the National Planning Policy Framework and also that:

- *Are consistent in scale and environmental impact with their rural location avoiding adverse impacts on sensitive habitats, Areas of Great Landscape Value and landscapes identified through landscape character assessments and the openness of the Green Belt.*
- *Conserve the landscape quality and scenic beauty of the Cranborne Chase and West Wiltshire Downs AONB, and comply with the provisions of the AONB Management Plan.*
- *Do not harm amenity and enjoyment of the countryside through the impact of noise and traffic generation.*
- *That minimise additional trips on the highway network and are accessible by sustainable modes other than the car.*

Subject to compliance with criteria set out above acceptable uses for rural diversification include:

- *Tourism*
- *Leisure and related activities*
- *Equestrian*
- *Small offices*
- *Light Manufacturing*
- *Renewable energy*
- *Retail (farm shops and pick your own)*

Support will be given to new forms of working practices, which include the creation of live/work spaces in rural areas. The assessment of these proposals will be made in accordance with rural housing need and potential affordable housing exception sites as well as access to services.
North Dorset District Council
POLICY 11: THE ECONOMY *Spatial Approach to Economic Development* *The economic development of the four main towns (i.e. Blandford, Gillingham, Shaftesbury and Sturminster Newton) will be supported by:* *a. the development of key strategic sites to meet the identified need for employment land; and* *b. the mixed-use regeneration of sites on the edge of existing town centres with a focus on office and non B-Class employment generating uses; and* *c. the continued improvement of town centres (in accordance with Policy 12) as the main focus for retail, leisure and other commercial activities.* *Economic development in the countryside (including at Stalbridge and the District's villages) will be supported by:* *d. enabling rural communities to plan meet their own local needs, particularly through neighbourhood planning; and* *e. countryside policies (Policies 29 to 32) which may permit: the re-use of existing buildings; the retention and small scale expansion of existing employment sites; the provision of certain forms of tourist accommodation; and equine-related developments.* *Jobs, Employment Land and Sites for Mixed Use Regeneration* *About 3,630 new jobs will be provided needed in North Dorset by 2031. [MM9] About 49.6 hectares of land will be developed primarily for employment uses in North Dorset between 2011 and 2026. This will include the development of the following key strategic sites primarily for employment uses:* *f. Part of the Brewery site, Blandford St. Mary (about 3.0 hectares);* *g. Land off Shaftesbury Lane, Blandford Forum (about 4.8 hectares);* *h. Brickfields Business Park, Gillingham (about 11.7 hectares);*

i. Land south of the A30 at Shaftesbury (about 7.0 hectares); and

j. North Dorset Business Park, Sturminster Newton (about 6.3 hectares)

The following sites, adjacent or close to existing town centres, have been identified for mixed-use regeneration:

k. Brewery site, Blandford St. Mary;

l. Station Road area, Gillingham;

m. Station Road area, Sturminster Newton; and

n. Land between the Town Centre and Christy's Lane, Shaftesbury.

<u>Uses on Employment Sites</u>

Existing employment sites and sites identified for future employment uses will be protected from other forms of development. On such sites, the Council will permit employment (B-Class) uses and, where it would support businesses and / or provide a wider range of jobs, may also permit:

o. community uses, such as community halls; and

p. healthcare facilities, such as doctors and vets surgeries (but not any healthcare facility with a residential element, such as a care home); and

q. education facilities, including training facilities for businesses and preschool nurseries; and

r. Small scale retail, which is ancillary to a B -Class use.

The Town and Country Planning (General Permitted Development) (England) Order 2015 also provides an opportunity to convert a Class B8 (storage and distribution) use to residential purposes under certain circumstances. These residential conversions, when completed, will be counted as part of the housing land supply. [MM9]

<u>Sustainable Tourism</u>

Tourist facilities and larger hotels will be encouraged in town centre locations in accordance with the sequential approach to the location of town centre uses in Policy 12 – Retail, Leisure and Other Commercial Developments. Smaller hotels, guest houses, bed and breakfast establishments and self-catering accommodation will be permitted within the settlement boundaries of Blandford, Gillingham, Shaftesbury and Sturminster Newton. Tourist accommodation in the countryside will be permitted in accordance with Policy 31 – Tourist Accommodation in the Countryside.

Purbeck District Council

Policy E: Employment.

New Employment Provision

New employment provision for B class uses should be located at the most sustainable locations in accordance with Policy LD: General Location of Development and existing employment sites that do not fit within the settlement hierarchy such as Holton Heath and Dorset Green.

In rural areas, small scale employment uses will be encouraged to help rural regeneration and improve the sustainability of communities in accordance with Policy CO: Countryside.

It will be important that new employment uses are accessible by sustainable transport modes. Larger employment developments (over 0.5ha) may be required to implement sustainable travel plans.

Planning applications for office development over 1,000sqm (gross) will need to submit a retail impact assessment prepared in accordance with national guidance.

Safeguarding Employment Land

- *Existing employment land, as set out in Table 2 in Section 6.5, will be safeguarded for B1, B2 or B8 uses. New proposals will only be permitted where they do not compromise the integrity of the employment site.*
- *The expansion of the existing employment use(s) will be permitted where this would not result in an unacceptable adverse impact in terms of visual harm, noise and traffic flow.*

Redevelopment or change of use of employment land

Exceptionally, other uses that generate employment may be considered on safeguarded employment land where they are appropriate to the location providing

that:

- The use is not primarily retail in nature;
- There is a need for the business to be located within the employment land on account of close connection with neighbouring businesses;
- There is a potential for an adverse impact if located within another more sensitive location, such as residential areas;

- There is a lack of suitable alternative sites, other than in existing employment land for the type of employment activity proposed; and
- It can be demonstrated that there is no longer a need for the employment use and the current use has been sufficiently and realistically marketed for a period of at least 9 months to show that the current use is no longer viable.

West Dorset and Weymouth & Portland Councils

ECON1. PROVISION OF EMPLOYMENT:

i) Employment development will generally be supported:

- *within or on the edge of a settlement;*
- *through the intensification or extension of existing premises;*
- *as part of a farm diversification scheme;*
- *through the re-use or replacement of an existing building; or*
- *in a rural location where this is essential for that type of business.*

ii) Proposals for live-work developments will be supported in locations considered suitable for open market residential development.

ECON2. PROTECTION OF KEY EMPLOYMENT SITES:

i) Within key employment sites (as identified on the policies map) applications for B1 (light industrial), B2 (general industrial), B8 (storage and distribution) and other similar uses will be permitted subject to proposals not having a significant adverse impact on surrounding land uses.

ii)The use of key employment sites for employment purposes other than B1, B2 and B8 may be appropriate if it can be proven that the use provides on-site support facilities or demonstrates an economic enhancement over and above B1/ B2 / B8 uses. Such development will not prejudice the efficient and effective use of the remainder of the employment area.

iii) Retail uses will not generally be supported. Exceptionally, uses which have trade links with employment uses or are un-neighbourly in character (such as car showrooms, tyre and exhaust centres, or trade counters) may be permitted on employment sites which have good access to a range of transport options.

iv) Other uses that do not provide direct, on-going local employment opportunities will not be permitted.

ECON3. PROTECTION OF OTHER EMPLOYMENT SITES

i) Outside key employment sites, the redevelopment of existing employment sites to an alternative employment use will normally be permitted.

ii) The redevelopment of employment land and premises for non-employment uses that are in accordance with other planning policies will be permitted where it will not prejudice the efficient and effective use of the remainder of the employment area and:

- *the present (or where vacant or derelict, the previous) use causes significant harm to the character or amenities of the surrounding area and it has been demonstrated that no other appropriate viable alternative employment uses could be attracted to the site; or*
- *a substantial over-supply of suitable alternative employment sites is locally available; or*
- *redevelopment of the site would offer important community benefits or no significant loss of jobs / potential jobs.*

Appendix C Assigning Sectors to Land Use Types

Narrow sector:	Broad sector:	% Non B	% Office	% Other business use (industry)	% Warehouse	B1-B8 emp in total
Agriculture forestry & fishing	Agriculture etc.	100.0%	0.0%	0.0%	0.0%	0.0%
Mining & quarrying	Extraction	100.0%	0.0%	0.0%	0.0%	0.0%
Food drink & tobacco	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Textiles etc	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Wood & paper	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Printing & recording	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Coke & petroleum	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Chemicals	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Pharmaceuticals	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Non-metallic mineral products	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Metals & metal products	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Electronics	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Electrical equipment	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Machinery	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Motor vehicles	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Other transport equipment	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Other manufacturing & repair	Manufacturing	0.0%	0.0%	100.0%	0.0%	100.0%
Electricity & gas	Utilities	100.0%	0.0%	0.0%	0.0%	0.0%

Assigning Sectors to Land Use Types

Narrow sector:	Broad sector:	% Non B	% Office	% Other business use (industry)	% Warehouse	B1-B8 emp in total
Water sewerage & waste	Utilities	100.0%	0.0%	0.0%	0.0%	0.0%
Construction	Construction	44.0%	0.0%	56.0%	0.0%	56.0%
Motor vehicles trade	Distribution	81.0%	1.0%	0.0%	18.0%	19.0%
Wholesale trade	Distribution	81.0%	1.0%	0.0%	18.0%	19.0%
Retail trade	Distribution	81.0%	1.0%	0.0%	18.0%	19.0%
Land transport	Transport & Communication	66.0%	0.0%	0.0%	34.0%	34.0%
Water transport	Transport & Communication	66.0%	0.0%	0.0%	34.0%	34.0%
Air transport	Transport & Communication	66.0%	0.0%	0.0%	34.0%	34.0%
Warehousing & postal	Transport & Communication	66.0%	0.0%	0.0%	34.0%	34.0%
Accommodation	Hotels & Catering	100.0%	0.0%	0.0%	0.0%	0.0%
Food & beverage services	Hotels & Catering	100.0%	0.0%	0.0%	0.0%	0.0%
Media	Business Services	4.0%	84.0%	12.0%	0.0%	96.0%
IT services	Business Services	4.0%	84.0%	12.0%	0.0%	96.0%
Financial & insurance	Financial Services	15.0%	85.0%	0.0%	0.0%	85.0%
Real estate	Business Services	4.0%	84.0%	12.0%	0.0%	96.0%
Legal & accounting	Business Services	4.0%	84.0%	12.0%	0.0%	96.0%
Head offices & management consultancies	Business Services	4.0%	84.0%	12.0%	0.0%	96.0%

Narrow sector:	Broad sector:	% Non B	% Office	% Other business use (industry)	% Warehouse	B1-B8 emp in total
Architectural & engineering services	Business Services	4.0%	84.0%	12.0%	0.0%	96.0%
Other professional services	Business Services	4.0%	84.0%	12.0%	0.0%	96.0%
Business support services	Business Services	4.0%	84.0%	12.0%	0.0%	96.0%
Public Administration & Defence	Public Admin & Defence	10.0%	70.0%	10.0%	10.0%	90.0%
Education	Education	100.0%	0.0%	0.0%	0.0%	0.0%
Health	Health & Social	90.0%	10.0%	0.0%	0.0%	10.0%
Residential & social	Health & Social	90.0%	10.0%	0.0%	0.0%	10.0%
Arts	Other Services	86.0%	14.0%	0.0%	0.0%	14.0%
Recreational services	Other Services	86.0%	14.0%	0.0%	0.0%	14.0%

Table C.1

Appendix D Questionnaire and Responses

Workspace Strategy Questionnaire

1. **We have identified five commercial property market areas for the Dorset Bournemouth and Poole area.**

A. Eastern Dorset including Bournemouth, Poole, Ferndown, Christchurch, Wimborne, Bournemouth Airport, Holton Heath, Upton

B. Dorchester, Weymouth and Portland, Winfrith (Dorset Green Technology Park - note this is also in C)

C. Winfrith (Dorset Green Technology Park), Wareham, Swanage and other parts of Purbeck

D. Blandford Forum, Sturminster Newton, Shaftesbury, Gillingham and other parts of North Dorset, Sherborne

E. Bridport, Lyme Regis, Beaminster and other parts of West Dorset

	Do you consider these are accurate?							
		Agree			**Disagree**			**Comments**
		Overall	**Eastern Dorset**	**Western Dorset**	**Overall**	**East Dorset**	**Western Dorset**	
Q1a	A	8 (89%)	5 (100%)	3 (75%)	1 (11%)	0 (0%)	1 (25%)	Include Verwood, Wallisdown/West Howe, Wareham, Woolsbridge Industrial Estate (3X) & Ebblake Industrial Estate (Verwood).
	B	7 (88%)	4 (100%)	3 (75%)	1 (13%)	0 (0%)	1 (25%)	Winfrith straddles both areas so could go either
	C	8 (100%)	4 (100%)	4 (100%)	0 (0%)	0 (0%)	0 (0%)	Winfrith straddles both areas so could either but I would probably say with best with Purbeck
	D	7 (88%)	4 (100%)	3 (75%)	1 (13%)	0 (0%)	1 (25%)	Exclude Sherborne / But include Yeovil
	E	7 (88%)	4 (100%)	3 (75%)	1 (13%)	0 (0%)	1 (25%)	Include Sherborne or better add Sherborne to Yeovil

	2. Which is the main market area you usually deal with?	
A	Eastern Dorset	5 (56%)
B	Dorchester, Weymouth, Portland, Winfrith	3 (33%)
C	Winfrith, Wareham, Swanage	0 (0%)
D	Blandford Forum, Sturminster Newton, Shaftesbury, Gillingham, Sherborne	1 (11%)
E	Bridport, Lyme Regis, Beaminster	0 (0%)

3. Looking at sub market areas for office and industrial, do you consider the following are appropriate for the Dorset, Bournemouth and Poole area?

A. Office - Bournemouth and Poole with supporting roles of Bournemouth Airport Business Park and Ferndown Industrial Estate

B. Industrial - Focus of the industrial premises in Poole, Bournemouth Airport Business Park and Ferndown Industrial Estate and Holton Heath

C. Weymouth, Portland and Dorchester - serving local catchment

D. Remaining rural areas of Wareham, Swanage, Blandford Forum, Sturminster Newton, Shaftesbury, Gillingham and Sherborne - sites meeting local property requirements

	Do you consider these are appropriate?						
	Agree			Disagree			Comments
	Overall	Eastern Dorset	Western Dorset	Overall	Eastern Dorset	Western Dorset	
A	7 (78%)	3 (60%)	4 (100%)	2 (22%)	2 (40%)	0 (0%)	
B	5 (63%)	2 (50%)	3 (75%)	3 (38%)	2 (50%)	1 (25%)	• Include - Wallisdown, West Howe, Verwood, Three Legged Cross & Woolsbridge and Christchurch. • Expand to A in first question
C	7 (88%)	3 (75%)	4 (100%)	1 (13%)	1 (25%)	0 (0%)	• Remove words serving local market -many of tenants are still nationals/internationals • But include Bridport

D	7 (88%)	4 (100%)	3 (75%)	1 (13%)	0 (0%)	1 (25%)	• Blandford and Sherborne are probably more than just serving local market • But include Yeovil

For the following questions, please respond for your main market area.

Investment Potential

4. Thinking of the current state of the following factors in your main market area, do you consider these are positive or negative to investment?

		Positive			**Negative**		
		Overall	**Eastern Dorset**	**Western Dorset**	**Overall**	**Eastern Dorset**	**Western Dorset**
A	**Availability of land/premises**	2 (22%)	2 (40%)	0 (0%)	7 (78%)	3 (60%)	4 (100%)
B	**Cost of land/premises**	2 (25%)	1 (25)	1 (25%)	6 (75%)	3 (75%)	3 (75%)
C	**Quality of land/premises**	2 (22%	1 (20%)	1 (25%)	7 (78%)	4 (80%)	3 (75%)
D	**Size of land/premises**	2 (22%)	1 (20%	1 (25%)	7 (78%)	4 (80%)	3 (75%)
E	**Capability for future expansion**	1 (11%)	1 (20%)	0 (0%)	8 (89%)	4 (80%)	4 (100%)
F	**Labour costs**	6 (75%)	3 (75%)	3 (75%)	2 (25%)	1 (25%)	1 (25%)
G	**Skills base**	5 (63%)	3 (75%)	2 (50%)	3 (38%)	1 (25%)	2 (50%)
H	**Ability to retain workforce**	6 (75%)	3 (75%)	3 (75%)	2 (25%)	1 (25%)	1 (25%)
I	**Access to the strategic road network**	3 (33%)	2 (40%)	1 (25%)	6 (67%)	3 (60%)	3 (75%)
J	**Access to rail/port**	5 (63%)	3 (75%)	2 (50%)	3 (38%)	1 (25%)	2 (50%)
K	**Access to international transport links**	3 (33%)	2 (40%)	1 (25%)	6 (67%)	3 (60%)	3 (75%)
L	**Access to high speed broadband**	4 (44%)	3 (60%)	1 (25%)	5 (56%)	2 (40%)	3 (75%)
M	**Proximity to customer base**	6 (67%	4 (80%)	2 (50%)	3 (33%)	1 (20%)	2 (50%)

N	**Proximity to higher education institution**	6 (67%)	5 (100%)	1 (25%)	3 (33%)	0 (0%)	3 (75%)
O	**Environmental factors**	5 (56%)	3 (60%)	2 (50%)	4 (44%)	2 (40%)	2 (50%)
P	**Affordable housing availability**	3 (43%)	1 (33%)	2 (50%)	4 (57%)	2 (67%)	2 (50%
Q	**Quality of life**	9 (100%)	5 (100%)	4 (100%)	0 (0%)	0 (0%)	0 (0%)
R	**Susceptibility to global market downturn**	5 (56%)	2 (40%)	3 (75%)	4 (44%)	3 (60%)	1 (25%)
S	**Responsiveness/support from Local Authority**	4 (44%)	2 (40%)	2 50%)	5 (56%)	3 (60%)	2 (50%)

Comments:

- There are variances over the area (Eastern Dorset.)
- A general lack of stock for land and premises (Eastern Dorset)
- I do feel there is a lack of understanding of how the market place works in regard to forward planning (Western Dorset)
- The above comments are overall but individual areas/towns have their own benefits/negative factors and not really fair/accurate to comment overall. (Western Dorset)

5. What do you consider the overall demand is for office and industrial investment in your main market area?

	High			**Moderate**			**Low**		
	Overall	**Eastern Dorset**	**Western Dorset**	**Overall**	**Eastern Dorset**	**Western Dorset**	**Overall**	**Eastern Dorset**	**Western Dorset**
Office	1 (11%)	1 (20%)	0 (0%)	3 (33%)	2 (40%)	1 (25%)	5 (56%)	2 (40%)	3 (75%)
Industrial	5 (56%)	2 (40%)	3 (75%)	3 (33%)	2 (40%)	1 (25%)	1 (11%)	1 (20%)	0 (0%)

Comments:

- I think industrial demand would be higher if we had the land supply in the right place (Western Dorset)
- Demand for both is now starting to increase (Eastern Dorset)
- Demand varies in terms of quality of space and market conditions (Eastern Dorset)

6. In your main market area what is the demand for employment land and premises from existing business in Dorset and from inward investment?

	High			Moderate			Low		
	Overall	**Eastern Dorset**	**Western Dorset**	**Overall**	**Eastern Dorset**	**Western Dorset**	**Overall**	**Eastern Dorset**	**Western Dorset**
Inward investment (from businesses located outside Dorset)	0 (0%)	0 (0%)	0 (0%)	4 (44%)	3 (60%)	1 (25%)	5 (56%)	2 (40%)	3 (75%)
Existing business (located within Dorset)	3 (33%)	2 (40%)	1 (25%)	4 (44%)	1 (20%)	3 (75%)	2 (22%)	2 (40%)	0 (0%)

Comments:

- But needs to be deliverable in the short term not medium/long term (Eastern Dorset)

7. **In your main market area what is the demand for sites with ready-made employment units and vacant employment land?**

	High			Moderate			Low		
	Overall	**Eastern Dorset**	**Western Dorset**	**Overall**	**Eastern Dorset**	**Western Dorset**	**Overall**	**Eastern Dorset**	**Western Dorset**
Sites with ready made units	4 (44%)	3 (60%)	1 (25%)	4 (44%)	1 (20%)	3 (75%)	1 (11%)	1 (20%)	0 (0%)
Vacant land	4 (44%)	3 (60%)	1 (25%)	3 (33%)	1 (20%)	2 (50%)	2 (22%)	1 (20%)	1 (25%)

Comments:

- Unit demand dependent on freehold or leasehold availability (Eastern Dorset)
- Ready made units depends on whether to purchase or lease-to purchase high in a relative sense (Western Dorset)

Current office stock/Market assessment

8. In your main market area is the existing supply of office accommodation suitable to meet current requirements?						
	Yes			No		
	Overall	Eastern Dorset	Western Dorset	Overall	Eastern Dorset	Western Dorset
Quantity	5 (56%)	2 (40%)	3 (75%)	4 (44%)	3 (60%)	1 (25%)
Quality	2 (22%)	0 (0%)	2 (50%)	7 (78%)	5 100%)	2 (50%)
Location	5 (56%)	2 (40%)	3 (75%	4 (44%)	3 (60%)	1 (25%)
Size of premises	4 (44%)	1 20%)	3 (75%)	5 (56%)	4 (80%)	1 (25%)

Comments:

- Lack of quality space available. Much now converted to residential/student housing (Eastern Dorset)
- With the public sector out of the market, the traditional office market is very small (Western Dorset)
- Generally low demand (Western Dorset)

9. Over the last twelve months, in your main market area what level of enquiries have you received for office accommodation?									
	High			Medium			Low		
	Overall	Eastern Dorset	Western Dorset	Overall	Eastern Dorset	Western Dorset	Overall	Eastern Dorset	Western Dorset
<999 sqft	1 (13%)	1 (25%)	0 (0%)	4 (50%)	2 (50%)	2 (50%)	3 (38%)	1 (25%)	2 (50%)
1,000-1,999 sqft	1 (13%)	1 (25%)	0 (0%)	5 (63%)	2 (50%)	3 (75%)	2 (25%)	1 (25%)	1 (25%)
2,000-4,999 sqft	1 (13%)	1 (25%)	0 (0%)	2 (25%)	2 (50%)	0 (0%)	5 (63%)	1 (25%)	4 (100%)
5,000-9,999 sqft	0 (0%)	0 (0%)	0 (0%)	2 (25%)	2 (50%)	0 (0%)	6 (75%)	2 (50%)	4 (100%)
10,000-19,999 sqft	0 (0%)	0 (0%)	0 (0%)	1 (13%)	1 (25%)	0 (0%)	7 (88%)	3 (75%)	4 (100%)
20,000-49,999 sqft	0 (0%)	0 (0%)	0 (0%)	1 (13%)	1 (25%)	0 (0%)	7 (88%)	3 (75%)	4 (100%)
50,000 sqft+	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	8 (100%)	4 (100%)	4 (100%)

	Comments
	NB there is a blurring of office/B1 workshop in this area (Eastern Dorset)

10. How does your local office market perform in relation to neighbouring areas including Southampton and Portsmouth?

	Overall	Eastern Dorset	Western Dorset
Very strongly	0 (0%)	0 (0%)	0 (0%)
Strongly	1 (11%)	1 (20%)	0 (0%)
Moderately	3 (33%)	3 (60%)	0 (0%)
Poorly	5 (56%)	1 (20%)	4 (100%)

Comments

- Current rents make it uneconomic for new speculative development of offices. (Eastern Dorset)
- I would not say Southampton or Portsmouth are strong office markets compared to say Bournemouth (Western Dorset)
- Not relevant to the North Dorset market (Western Dorset)

11. How does your local office market perform in relation to neighbouring areas including Southampton and Portsmouth? Please rank with 1 being the highest.

		Overall	Eastern Dorset	Western Dorset
	Southampton	6 (100%)	3 (100%)	3 (100%)
	Portsmouth	6 (100%)	3 (100%)	3 (100%)
	Your main market area	7 (100%)	3 (100%)	4 (100%)

12. In your main market area what do you think the future overall trend in the office market will be during the next 5 - 10 years?

	Overall	Eastern Dorset	Western Dorset
High growth	1 (11%)	1 (20%)	0 (0%)
Moderate growth	3 (33%)	3 (60%)	0 (0%)
Low growth	5 (56%)	1 (20%)	4 (100%)

13. In your main market area what do you consider will be the future demand for office accommodation over the next 5 - 10 years?									
	High			Medium			Low		
	Overall	Eastern Dorset	Western Dorset	Overall	Eastern Dorset	Western Dorset	Overall	Eastern Dorset	Western Dorset
<999 sqft	1 (13%)	1 (25%)	0 (0%)	6 (75%)	2 (50%)	4 (100%)	1 (13%)	1 (25%)	0 (0%)
1,000-1,999 sqft	2 (25%)	2 (50%)	0 (0%)	5 (63%)	1 (25%)	4 (100%)	1 (13%)	1 (25%)	0 (0%)
2,000-4,999 sqft	1 (13%)	1 (25%)	0 (0%)	4 (50%)	2 (50%)	2 (50%)	3 (38%)	1 (25%)	2 (50%)
5,000-9,999 sqft	0 (0%)	0 (0%)	0 (0%)	3 (43%)	3 (75%)	0 (0%)	4 (57%)	1 (25%)	3 (100%)
10,000-19,999 sqft	0 (0%)	0 (0%)	0 (0%)	3 (43%)	3 (75%)	0 (0%)	4 (57%)	1 (25%)	3 (100%)
20,000-49,000 sqft	0 (0%)	0 (0%)	0 (0%)	2 (29%)	2 (50%)	0 (0%)	5 (71%)	2 (50%)	3 (100%)
50,000+ sqft	0 (0%)	0 (0%)	0 (0%)	1 (14%)	1 (25%)	0 (0%)	6 (86%)	3 (75%)	3 (100%)

14. In your main market area to what extent has the office to residential permitted development right affected the ability to meet the market demand for office accommodation?			
	Overall	Eastern Dorset	Western Dorset
High impact	2 (25%)	2 (40%)	0 (0%)
Moderate impact	2 (25%)	2 (40%	0 (0%)
Low impact	4 (50%)	1 (20%)	3 (100%)

<u>Current industrial stock/Market assessment</u>

15. In your main market area is the existing supply of industrial accommodation suitable to meet current requirements?						
	Yes			No		
	Overall	Eastern Dorset	Western Dorset	Overall	Eastern Dorset	Western Dorset
Quantity	2 (25%)	1 (25%)	1 (25%)	6 (75%)	3 (75%)	3 (75%)
Quality	1 (13%)	0 (0%)	1 (25%)	7 (88%)	4 (100%)	3 (75%)

Location	4 (50%	2 (50%)	2 (50%)	4 (50%)	2 (50%)	2 (50%)
Size of premises	2 (25%)	1 (25%)	1 (25%)	6 (75%)	3 (75%)	3 (75%)
Comments						
• Small market but supply small and poor (Eastern Dorset)						

16. In your main market area over the last twelve months, what level of enquiries have you received for industrial accommodation?

	High			**Moderate**			**Low**		
	Overall	**Eastern Dorset**	**Western Dorset**	**Overall**	**Eastern Dorset**	**Western Dorset**	**Overall**	**Eastern Dorset**	**Western Dorset**
<999 sqft	1 (14%)	0 (0%)	1 (25%)	5 (71%)	2 (67%)	3 (75%)	1 (14%)	1 (33%)	0 (0%)
1,000-1,999 sqft	2 (29%)	1 (33%)	1 (25%)	4 (57%)	1 (33%)	3 (75%)	1 (14%)	1 (33%)	0 (0%)
2,000-4,999 sqft	0 (0%)	0 (0%)	0 (0%)	4 (57%)	2 (67%)	2 (50%)	3 (43%)	1 (33%)	2 (50%)
5,000-9,999 sqft	0 (0%)	0 (0%)	0 (0%)	4 (57%)	2 (67%)	2 (50%)	3 (43%)	1 (33%)	2 (50%)
10,000-19,999 sqft	1 (14%)	1 (33%)	0 (0%)	1 (14%)	1 (33%)	0 (0%)	5 (71%)	1 (33%)	4 (100%)
20,000-49,999 sqft	1 (14%)	1 (33%)	0 (0%)	1 (14%)	1 (33%)	0 (0%)	5 (71%	1 (33%)	4 (100%)
50,000+ sqft	0 (0%)	0 (0%)	0 (0%)	2 (29%)	2 (67%)	0 (0%)	5 (71%)	1 (33%)	4 (100%)
Comments:									
• Has been a poor year generally (as is normal for an election year) but 2016 is looking better (Western Dorset)									

17. How does your local industrial market perform in relation to neighbouring areas including Southampton and Portsmouth?			
	Overall	**Eastern Dorset**	**Western Dorset**
Very strongly	0 (0%)	0 (0%)	0 (0%)
Strongly	3 (38%)	3 (75%)	0 (0%)
Moderately	0 (0%)	0 (0%)	0 (0%)
Poorly	5 (63%)	1 (25%)	4 (100%)
Comments			

- Depends what 'perform' is based on i.e. take up of space,rental growth,highest rent,amount of floorspace etc (Eastern Dorset)
- Not really relevant to the North Dorset market (Western Dorset)

18. How does your local industrial market perform in relation to neighbouring areas including Southampton and Portsmouth? Please rank with 1 being the highest.			
	Overall	**Eastern Dorset**	**Western Dorset**
Southampton	6 (100%)	3 (100%)	3 (100%)
Portsmouth	5 (100%)	3 (100%)	2 (100%)
Your main market area	5 (100%)	3 (100%)	3 (100%)

19. In your main market area what do you think the future overall trend in the industrial market will be during the next 5 - 10 years?				
	Overall	**Eastern Dorset**	**Western Dorset**	
High growth	3 (43%)	3 (75%)	0 (0%)	Assuming you mean overall demand for floor space not rental growth (Eastern Dorset)
Moderate growth	2 (29%)	0 (0%)	2 (67%)	If we can supply the land for new build. Low if not (Western Dorset)
Low growth	2 (29%)	1 (25%)	1 (33%)	

20. In your main market area what do you consider will be the future demand for industrial accommodation over the next 5 - 10 years?									
	High			Moderate			Low		
	Overall	Eastern Dorset	Western Dorset	Overall	Eastern Dorset	Western Dorset	Overall	Eastern Dorset	Western Dorset
<999 sqft	4 (57%)	1 (33%)	3 (75%)	2 (29%)	1 (33%)	1 (25%)	1 (14%)	1 (33%)	0 (0%)
1,000-1,999 sqft	5 (71%)	2 (67%)	3 (75%)	1 (14%)	0 (0%)	1 (25%)	1 (14%)	1 (33%)	0 (0%)
2,000-4,999 sqft	3 (43%)	1 (33%)	2 (50%)	3 (43%)	1 (33%)	2 (50%)	1 (14%)	1 (33%)	0 (0%)
5,000-9,999 sqft	1 (14%)	1 (33%)	0 (0%)	4 (57%)	1 (33%)	3 (75%)	2 (29%)	1 (33%)	1 (25%)
10,000-19,999 sqft	2 (29%)	2 (67%)	0 (0%)	1 (14%)	0 (0%)	1 (25%)	4 (57%)	1 (33%)	3 (75%)
20,000-49,999 sqft	2 (29%)	2 (67%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	5 (71%)	1 (33%)	4 (100%)
50,000+ sqft	0 (0%)	0 (0%)	0 (0%)	1 (17%)	1 (50%)	0 (0%)	5 (83%)	1 (33%)	4 (100%)
Comments									
• If we can supply new build for sale									

21. In your main market area to what extent do you think proposed changes to the permitted development right from industrial to residential will affect the ability to meet market demand for industrial accommodation?			
	Overall	Eastern Dorset	Western Dorset
High impact	0 (0%)	0 (0%)	0 (0%)
Moderate impact	0 (0%)	0 (0%)	0 (0%)
Low impact	7 (100%)	4 (100%)	3 (100%)
Comments			
• I don't think it will only take out older character premises which don't suit modern business so little affect (Western Dorset)			

Overall comments on employment land supply by market area

22. **Is there sufficient available employment land of the right type and appropriate location to meet the needs of business now and in the future?**

	Yes	No
Quantity	2 (22%)	7 (78%)
Quality	3 (33%)	6 (67%)
Type	2 (22%)	7 (78%)
Location	4 (44%)	5 (56%)

Comments:

- There is a lot of employment land that has not been developed but a large proportion is not readily available (Eastern Dorset)
- Much of the allocated land is undeliverable (Eastern Dorset)
- Much of it is in the wrong place to attract the type of business we need (Western Dorset)
- Smaller parcels of land required (Western Dorset)

23. **What do you consider to be the main barriers to employment sites coming forward?**

Transport infrastructure requirements	4 (57%)
Poor access to strategic road network	4 (57%)
Lack of proximity to public transport	1 (14%)
Lack of proximity to suppliers	0 (0%)
Location/market area	2 (29%)
Site image	0 (0%)
Environmental factors	3 (43%)
Lack of demand	3 (43%)
Availability of finance	3 (43%)
Availability of skilled workforce	0 (0%)
Access to high speed broadband	0 (0%)

Other	2 29%)

Other, please specify:
• Planning difficulties and availability/cost of providing infrastructure

Comments:

- Landowners not actively seeking to develop their sites. Non allocated sites located on the edge of existing industrial estates not being granted planning consent/being considered for planning consent (Eastern Dorset)
- Allocations in the right areas (Eastern Dorset)
- Unviability of commercial developments - rents are too low (Eastern Dorset)
- It is lack of vision in putting the sites in the right place at the start and lack of leadership ensuring it happens (Western Dorset)
- Smaller parcels of land (Western Dorset)

Thank you for taking part in our survey

Appendix E Agents Meetings Attendees

As part of the preparation of the Workspace Strategy and the commercial property market review, meetings were held with commercial property agents in Eastern and Western Dorset. Details of the meetings held and list of attendees is set out below:

Workspace Strategy Eastern Dorset Meeting 8th December 2015, 2.00pm, Borough of Poole Civic Offices:

Attendance:

George Whalley - Christchurch and East Dorset Councils

Bill Gordon - Borough of Poole

Anne Gray - Dorset County Council

Jo Rufus - Dorset County Council

Alex Clothier - Purbeck District Council

Martin Hastelow - Savills

Gareth Jones - Hardisty Jones Associates

Bill Parker - Goadsby

Chris Wilson - Goadsby

Steve Tompkins - Nettleship Sawyer

Simon West - Cowling and West

Workspace Strategy Western Dorset Meeting, 16th December, West Dorset District Council Offices:

Attendees:

George Whalley - Christchurch and East Dorset Councils

Jo Rufus - Dorset County Council

David Walsh - Dorset County Council

David Foot - Chesters Commercial, Yeovil

Appendix E Agents Meetings Attendees

Jan Merriott - Symonds & Sampson, Poundbury

Tim Wright - RMW Knight, Yeovil (arrived a bit late)

Andy Cochrane - Woolley & Wallis, Salisbury

Neil Upward - Goadsby, Dorchester

Alex Clothier - Purbeck District Council

Victoria Martin - Dorset Councils Partnership (Weymouth and West Dorset and North Dorset District Councils)

Terry Sneller - Dorset Councils Partnership (Weymouth and West Dorset and North Dorset District Councils)

Gareth Jones - Dorset Councils Partnership (Weymouth and West Dorset and North Dorset District Councils)

Appendix F Plot Ratios by Local Authority

Based on the following:

Bournemouth, Poole and Dorset districts = completed B1 to B8 developments 1994 to 2014/15 plus under construction and outstanding at at 1 April 2015

Office	B1 Office and office
Industry	B1 Industry and industry
Warehouse	Warehouse
Mixed	B1 unspecified and mixed

Table F.1

1994/95 to 2014/15			
	Plot ratios		
Christchurch	2797	0.28	Office
Christchurch	3737	0.37	Industry
Christchurch	2686	0.27	Warehouse
Christchurch	2825	0.28	Mixed
Christchurch	3045	0.30	Total
East Dorset	1503	0.15	Office
East Dorset	3461	0.35	Industry
East Dorset	3215	0.32	Warehouse
East Dorset	3574	0.36	Mixed
East Dorset	3113	0.31	Total
North Dorset	1941	0.19	Office
North Dorset	2812	0.28	Industry
North Dorset	6246	0.62	Warehouse

Plot Ratios by Local Authority

1994/95 to 2014/15			
	Plot ratios		
North Dorset	2628	0.26	Mixed
North Dorset	2894	0.29	Total
Purbeck	4852	0.49	Office
Purbeck	3691	0.37	Industry
Purbeck	1454	0.15	Warehouse
Purbeck	2780	0.28	Mixed
Purbeck	3435	0.34	Total
West Dorset	3657	0.37	Office
West Dorset	3233	0.32	Industry
West Dorset	1568	0.16	Warehouse
West Dorset	2552	0.26	Mixed
West Dorset	2791	0.28	Total
Weymouth & Portland	5974	0.60	Office
Weymouth & Portland	1911	0.19	Industry
Weymouth & Portland	4565	0.46	Warehouse
Weymouth & Portland	3924	0.39	Mixed
Weymouth & Portland	3230	0.32	Total
Bournemouth	4086	0.41	Office
Bournemouth	2247	0.22	Industry
Bournemouth	3939	0.39	Warehouse
Bournemouth	4771	0.48	Mixed

1994/95 to 2014/15			
	Plot ratios		
Bournemouth	4021	0.40	Total
Poole	2639	0.26	Office
Poole	4038	0.40	Industry
Poole	2620	0.26	Warehouse
Poole	3704	0.37	Mixed
Poole	3622	0.36	Total
DCC Dorset	2808	0.28	Office
DCC Dorset	3099	0.31	Industry
DCC Dorset	3855	0.39	Warehouse
DCC Dorset	2800	0.28	Mixed
DCC Dorset	2963	0.30	Total
Dorset LEP area	3296	0.33	Office
Dorset LEP area	3163	0.32	Industry
Dorset LEP area	3698	0.37	Warehouse
Dorset LEP area	3047	0.30	Mixed
Dorset LEP area	3154	0.32	Total

Table F.2

Appendix G Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Trend Scenario

Scenario: Trend (Flexibility: Zero)

2013-18	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	15.3	1.7	17.0	ha
Industrial baseline (other + warehousing)	20.0	1.8	21.8	ha
Baseline B use land requirement (ha)	***35.2***	***3.5***	***38.8***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**48.1**	**8.2**	**56.4**	**ha**

2018-23	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	4.8	0.4	5.1	ha
Industrial baseline (other + warehousing)	16.7	4.0	20.7	ha
Baseline B use land requirement (ha)	***21.4***	***4.4***	***25.9***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**34.3**	**9.1**	**43.5**	**ha**

2013-23	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	20.0	2.1	22.1	ha
Industrial baseline (other + warehousing)	36.7	5.9	42.5	ha
Baseline B use land requirement (ha)	***56.7***	***7.9***	***64.6***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**82.4**	**17.4**	**99.8**	**ha**

2023-28	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	5.5	0.4	5.9	ha
Industrial baseline (other + warehousing)	7.0	0.6	7.6	ha
Baseline B use land requirement (ha)	***12.6***	***1.0***	***13.5***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**25.4**	**5.7**	**31.1**	**ha**

Appendix G Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Trend Scenario

2028-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	6.4	0.4	6.8	ha
Industrial baseline (other + warehousing)	13.5	1.6	15.1	ha
Baseline B use land requirement (ha)	***19.9***	***2.0***	***21.9***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**32.8**	**6.7**	**39.5**	**ha**

2023-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	12.0	0.8	12.7	ha
Industrial baseline (other + warehousing)	20.5	2.2	22.7	ha
Baseline B use land requirement (ha)	***32.5***	***3.0***	***35.4***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**58.2**	**12.4**	**70.7**	**ha**

2013-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	32.0	2.9	34.8	ha
Industrial baseline (other + warehousing)	57.2	8.0	65.2	ha
Baseline B use land requirement (ha)	***89.1***	***10.9***	***100.1***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	22.9	12.4	35.3	ha
Allowance for churn	28.7	6.5	35.2	ha
Total B use land requirement (ha) with flexibility and allowances	**140.7**	**29.8**	**170.5**	**ha**

Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Trend Scenario

Scenario: Trend (Flexibility: 10%)

2013-18	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	15.3	1.7	17.0	ha
Industrial baseline (other + warehousing)	20.0	1.8	21.8	ha
Baseline B use land requirement (ha)	***35.2***	***3.5***	***38.8***	***ha***
Allowance for flexibility	3.5	0.4	3.9	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**51.6**	**8.6**	**60.2**	**ha**

2018-23	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	4.8	0.4	5.1	ha
Industrial baseline (other + warehousing)	16.7	4.0	20.7	ha
Baseline B use land requirement (ha)	***21.4***	***4.4***	***25.9***	***ha***
Allowance for flexibility	2.1	0.4	2.6	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**36.5**	**9.6**	**46.1**	**ha**

2013-23	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	20.0	2.1	22.1	ha
Industrial baseline (other + warehousing)	36.7	5.9	42.5	ha
Baseline B use land requirement (ha)	***56.7***	***7.9***	***64.6***	***ha***
Allowance for flexibility	5.7	0.8	6.5	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**88.1**	**18.2**	**106.3**	**ha**

2023-28	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	5.5	0.4	5.9	ha
Industrial baseline (other + warehousing)	7.0	0.6	7.6	ha
Baseline B use land requirement (ha)	***12.6***	***1.0***	***13.5***	***ha***
Allowance for flexibility	1.3	0.1	1.4	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**26.7**	**5.8**	**32.5**	**ha**

2028-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	6.4	0.4	6.8	ha
Industrial baseline (other + warehousing)	13.5	1.6	15.1	ha
Baseline B use land requirement (ha)	***19.9***	***2.0***	***21.9***	***ha***
Allowance for flexibility	2.0	0.2	2.2	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**34.8**	**6.9**	**41.7**	**ha**

2023-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	12.0	0.8	12.7	ha
Industrial baseline (other + warehousing)	20.5	2.2	22.7	ha
Baseline B use land requirement (ha)	***32.5***	***3.0***	***35.4***	***ha***
Allowance for flexibility	3.2	0.3	3.5	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**61.5**	**12.7**	**74.2**	**ha**

2013-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	32.0	2.9	34.8	ha
Industrial baseline (other + warehousing)	57.2	8.0	65.2	ha
Baseline B use land requirement (ha)	***89.1***	***10.9***	***100.1***	***ha***
Allowance for flexibility	8.9	1.1	10.0	
Allowance for windfall losses	22.9	12.4	35.3	ha
Allowance for churn	28.7	6.5	35.2	ha
Total B use land requirement (ha) with flexibility and allowances	**149.6**	**30.9**	**180.5**	**ha**

Scenario: Trend (Flexibility: 20%)

2013-18	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	15.3	1.7	17.0	ha
Industrial baseline (other + warehousing)	20.0	1.8	21.8	ha
Baseline B use land requirement (ha)	***35.2***	***3.5***	***38.8***	***ha***
Allowance for flexibility	7.0	0.7	7.8	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**55.2**	**9.0**	**64.1**	**ha**

2018-23	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	4.8	0.4	5.1	ha
Industrial baseline (other + warehousing)	16.7	4.0	20.7	ha
Baseline B use land requirement (ha)	***21.4***	***4.4***	***25.9***	***ha***
Allowance for flexibility	4.3	0.9	5.2	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**38.6**	**10.0**	**48.7**	**ha**

2013-23	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	20.0	2.1	22.1	ha
Industrial baseline (other + warehousing)	36.7	5.9	42.5	ha
Baseline B use land requirement (ha)	***56.7***	***7.9***	***64.6***	***ha***
Allowance for flexibility	11.3	1.6	12.9	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**93.8**	**19.0**	**112.8**	**ha**

2023-28	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	5.5	0.4	5.9	ha
Industrial baseline (other + warehousing)	7.0	0.6	7.6	ha
Baseline B use land requirement (ha)	***12.6***	***1.0***	***13.5***	***ha***
Allowance for flexibility	2.5	0.2	2.7	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**28.0**	**5.9**	**33.8**	**ha**

Appendix G Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Trend Scenario

2028-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	6.4	0.4	6.8	ha
Industrial baseline (other + warehousing)	13.5	1.6	15.1	ha
Baseline B use land requirement (ha)	***19.9***	***2.0***	***21.9***	***ha***
Allowance for flexibility	4.0	0.4	4.4	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**36.8**	**7.1**	**43.9**	**ha**

2023-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	12.0	0.8	12.7	ha
Industrial baseline (other + warehousing)	20.5	2.2	22.7	ha
Baseline B use land requirement (ha)	***32.5***	***3.0***	***35.4***	***ha***
Allowance for flexibility	6.5	0.6	7.1	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**64.7**	**13.0**	**77.7**	**ha**

2013-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	32.0	2.9	34.8	ha
Industrial baseline (other + warehousing)	57.2	8.0	65.2	ha
Baseline B use land requirement (ha)	***89.1***	***10.9***	***100.1***	***ha***
Allowance for flexibility	17.8	2.2	20.0	
Allowance for windfall losses	22.9	12.4	35.3	ha
Allowance for churn	28.7	6.5	35.2	ha
Total B use land requirement (ha) with flexibility and allowances	**158.5**	**32.0**	**190.5**	**ha**

Appendix H Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Planned Growth Scenario

Scenario: Planned Growth (Flexibility: Zero)

2013-18	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	14.1	2.6	16.7	ha
Industrial baseline (other + warehousing)	20.0	6.5	26.4	ha
Baseline B use land requirement (ha)	***34.05***	***9.08***	***43.13***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**46.9**	**13.8**	**60.7**	**ha**

2018-23	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	9.1	2.7	11.8	ha
Industrial baseline (other + warehousing)	28.7	9.2	38.0	ha
Baseline B use land requirement (ha)	***37.82***	***11.98***	***49.80***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**50.7**	**16.7**	**67.4**	**ha**

2013-23	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	23.2	5.3	28.5	ha
Industrial baseline (other + warehousing)	48.7	15.7	64.4	ha
Baseline B use land requirement (ha)	***71.87***	***21.06***	***92.93***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**97.6**	**30.5**	**128.1**	**ha**

2023-28	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	7.8	1.0	8.8	ha
Industrial baseline (other + warehousing)	13.6	5.3	19.0	ha
Baseline B use land requirement (ha)	***21.47***	***6.32***	***27.79***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**34.4**	**11.0**	**45.4**	**ha**

Appendix H Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Planned Growth Scenario

2028-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	8.4	0.6	9.0	ha
Industrial baseline (other + warehousing)	19.4	2.9	22.3	ha
Baseline B use land requirement (ha)	***27.79***	***3.45***	***31.25***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**40.7**	**8.2**	**48.9**	**ha**

2023-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	16.3	1.5	17.8	ha
Industrial baseline (other + warehousing)	33.0	8.2	41.2	ha
Baseline B use land requirement (ha)	***49.26***	***9.77***	***59.03***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**75.0**	**19.2**	**94.3**	**ha**

2013-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	39.4	6.9	46.3	ha
Industrial baseline (other + warehousing)	81.7	23.9	105.6	ha
Baseline B use land requirement (ha)	***121.13***	***30.83***	***151.96***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	22.9	12.4	35.3	ha
Allowance for churn	28.7	6.5	35.2	ha
Total B use land requirement (ha) with flexibility and allowances	**172.7**	**49.7**	**222.4**	**ha**

Scenario: Planned Growth (Flexibility: 10%)

2013-18	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	14.1	2.6	16.7	ha
Industrial baseline (other + warehousing)	20.0	6.5	26.4	ha
Baseline B use land requirement (ha)	***34.0***	***9.1***	***43.1***	***ha***
Allowance for flexibility	3.4	0.9	4.3	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**50.3**	**14.7**	**65.1**	**ha**

2018-23	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	9.1	2.7	11.8	ha
Industrial baseline (other + warehousing)	28.7	9.2	38.0	ha
Baseline B use land requirement (ha)	***37.8***	***12.0***	***49.8***	***ha***
Allowance for flexibility	3.8	1.2	5.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**54.5**	**17.9**	**72.4**	**ha**

2013-23	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	23.2	5.3	28.5	ha
Industrial baseline (other + warehousing)	48.7	15.7	64.4	ha
Baseline B use land requirement (ha)	***71.9***	***21.1***	***92.9***	***ha***
Allowance for flexibility	7.2	2.1	9.3	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**104.8**	**32.6**	**137.4**	**ha**

2023-28	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	7.8	1.0	8.8	ha
Industrial baseline (other + warehousing)	13.6	5.3	19.0	ha
Baseline B use land requirement (ha)	***21.5***	***6.3***	***27.8***	***ha***
Allowance for flexibility	2.1	0.6	2.8	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**36.5**	**11.7**	**48.2**	**ha**

Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Planned Growth Scenario

2028-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	8.4	0.6	9.0	ha
Industrial baseline (other + warehousing)	19.4	2.9	22.3	ha
Baseline B use land requirement (ha)	***27.8***	***3.5***	***31.2***	***ha***
Allowance for flexibility	2.8	0.3	3.1	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**43.5**	**8.5**	**52.0**	**ha**

2023-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	16.3	1.5	17.8	ha
Industrial baseline (other + warehousing)	33.0	8.2	41.2	ha
Baseline B use land requirement (ha)	***49.3***	***9.8***	***59.0***	***ha***
Allowance for flexibility	4.9	1.0	5.9	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**80.0**	**20.2**	**100.2**	**ha**

2013-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	39.4	6.9	46.3	ha
Industrial baseline (other + warehousing)	81.7	23.9	105.6	ha
Baseline B use land requirement (ha)	***121.1***	***30.8***	***152.0***	***ha***
Allowance for flexibility	12.1	3.1	15.2	
Allowance for windfall losses	22.9	12.4	35.3	ha
Allowance for churn	28.7	6.5	35.2	ha
Total B use land requirement (ha) with flexibility and allowances	**184.8**	**52.8**	**237.6**	**ha**

Scenario: Planned Growth (Flexibility: 20%)

2013-18	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	14.1	2.6	16.7	ha
Industrial baseline (other + warehousing)	20.0	6.5	26.4	ha
Baseline B use land requirement (ha)	***34.0***	***9.1***	***43.1***	***ha***
Allowance for flexibility	6.8	1.8	8.6	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**53.7**	**15.6**	**69.4**	**ha**

2018-23	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	9.1	2.7	11.8	ha
Industrial baseline (other + warehousing)	28.7	9.2	38.0	ha
Baseline B use land requirement (ha)	***37.8***	***12.0***	***49.8***	***ha***
Allowance for flexibility	7.6	2.4	10.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**58.3**	**19.1**	**77.4**	**ha**

2013-23	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	23.2	5.3	28.5	ha
Industrial baseline (other + warehousing)	48.7	15.7	64.4	ha
Baseline B use land requirement (ha)	***71.9***	***21.1***	***92.9***	***ha***
Allowance for flexibility	14.4	4.2	18.6	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**112.0**	**34.7**	**146.7**	**ha**

2023-28	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	7.8	1.0	8.8	ha
Industrial baseline (other + warehousing)	13.6	5.3	19.0	ha
Baseline B use land requirement (ha)	***21.5***	***6.3***	***27.8***	***ha***
Allowance for flexibility	4.3	1.3	5.6	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**38.6**	**12.3**	**51.0**	**ha**

Appendix H Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Planned Growth Scenario

2028-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	8.4	0.6	9.0	ha
Industrial baseline (other + warehousing)	19.4	2.9	22.3	ha
Baseline B use land requirement (ha)	***27.8***	***3.5***	***31.2***	***ha***
Allowance for flexibility	5.6	0.7	6.2	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**46.2**	**8.9**	**55.1**	**ha**

2023-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	16.3	1.5	17.8	ha
Industrial baseline (other + warehousing)	33.0	8.2	41.2	ha
Baseline B use land requirement (ha)	***49.3***	***9.8***	***59.0***	***ha***
Allowance for flexibility	9.9	2.0	11.8	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**84.9**	**21.2**	**106.1**	**ha**

2013-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	39.4	6.9	46.3	ha
Industrial baseline (other + warehousing)	81.7	23.9	105.6	ha
Baseline B use land requirement (ha)	***121.1***	***30.8***	***152.0***	***ha***
Allowance for flexibility	24.2	6.2	30.4	
Allowance for windfall losses	22.9	12.4	35.3	ha
Allowance for churn	28.7	6.5	35.2	ha
Total B use land requirement (ha) with flexibility and allowances	**196.9**	**55.9**	**252.8**	**ha**

Appendix I Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Accelerated Growth Scenario

Scenario: Accelerated Growth (Flexibility: Zero)

2013-18	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	14.1	2.6	16.7	ha
Industrial baseline (other + warehousing)	20.0	6.5	26.4	ha
Baseline B use land requirement (ha)	***34.05***	***9.08***	***43.13***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**46.9**	**13.8**	**60.7**	**ha**

2018-23	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	9.4	2.7	12.1	ha
Industrial baseline (other + warehousing)	30.6	9.2	39.9	ha
Baseline B use land requirement (ha)	***39.96***	***11.98***	***51.94***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**52.8**	**16.7**	**69.5**	**ha**

2013-23	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	23.5	5.3	28.8	ha
Industrial baseline (other + warehousing)	50.6	15.7	66.3	ha
Baseline B use land requirement (ha)	***74.01***	***21.06***	***95.07***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**99.8**	**30.5**	**130.3**	**ha**

2023-28	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	9.9	1.0	10.9	ha
Industrial baseline (other + warehousing)	20.0	5.3	25.3	ha
Baseline B use land requirement (ha)	***29.87***	***6.32***	***36.19***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**42.8**	**11.0**	**53.8**	**ha**

Appendix I Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Accelerated Growth Scenario

2028-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	8.6	0.6	9.2	ha
Industrial baseline (other + warehousing)	19.7	3.3	23.0	ha
Baseline B use land requirement (ha)	***28.27***	***3.92***	***32.18***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**41.2**	**8.6**	**49.8**	**ha**

2023-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	18.4	1.6	20.0	ha
Industrial baseline (other + warehousing)	39.7	8.6	48.4	ha
Baseline B use land requirement (ha)	***58.14***	***10.23***	***68.37***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**83.9**	**19.7**	**103.6**	**ha**

2013-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	41.9	6.9	48.8	ha
Industrial baseline (other + warehousing)	90.3	24.4	114.6	ha
Baseline B use land requirement (ha)	***132.15***	***31.29***	***163.44***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	22.9	12.4	35.3	ha
Allowance for churn	28.7	6.5	35.2	ha
Total B use land requirement (ha) with flexibility and allowances	**183.7**	**50.2**	**233.9**	**ha**

Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Accelerated Growth Scenario

Scenario: Accelerated Growth (Flexibility: 10%)

2013 -18	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	14.1	2.6	16.7	ha
Industrial baseline (other + warehousing)	20.0	6.5	26.4	ha
Baseline B use land requirement (ha)	***34.0***	***9.1***	***43.1***	***ha***
Allowance for flexibility	3.4	0.9	4.3	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**50.3**	**14.7**	**65.1**	**ha**

2018-23	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	9.4	2.7	12.1	ha
Industrial baseline (other + warehousing)	30.6	9.2	39.9	ha
Baseline B use land requirement (ha)	***40.0***	***12.0***	***51.9***	***ha***
Allowance for flexibility	4.0	1.2	5.2	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**56.8**	**17.9**	**74.7**	**ha**

2013-23	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	23.5	5.3	28.8	ha
Industrial baseline (other + warehousing)	50.6	15.7	66.3	ha
Baseline B use land requirement (ha)	***74.0***	***21.1***	***95.1***	***ha***
Allowance for flexibility	7.4	2.1	9.5	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**107.2**	**32.6**	**139.8**	**ha**

2023-28	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	9.9	1.0	10.9	ha
Industrial baseline (other + warehousing)	20.0	5.3	25.3	ha
Baseline B use land requirement (ha)	***29.9***	***6.3***	***36.2***	***ha***
Allowance for flexibility	3.0	0.6	3.6	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**45.7**	**11.7**	**57.4**	**ha**

Appendix I Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Accelerated Growth Scenario

2028-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	8.6	0.6	9.2	ha
Industrial baseline (other + warehousing)	19.7	3.3	23.0	ha
Baseline B use land requirement (ha)	***28.3***	***3.9***	***32.2***	***ha***
Allowance for flexibility	2.8	0.4	3.2	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**44.0**	**9.0**	**53.0**	**ha**

2023-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	18.4	1.6	20.0	ha
Industrial baseline (other + warehousing)	39.7	8.6	48.4	ha
Baseline B use land requirement (ha)	***58.1***	***10.2***	***68.4***	***ha***
Allowance for flexibility	5.8	1.0	6.8	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**89.7**	**20.7**	**110.4**	**ha**

2013-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	41.9	6.9	48.8	ha
Industrial baseline (other + warehousing)	90.3	24.4	114.6	ha
Baseline B use land requirement (ha)	***132.1***	***31.3***	***163.4***	***ha***
Allowance for flexibility	13.2	3.1	16.3	
Allowance for windfall losses	22.9	12.4	35.3	ha
Allowance for churn	28.7	6.5	35.2	ha
Total B use land requirement (ha) with flexibility and allowances	**196.9**	**53.3**	**250.2**	**ha**

Scenario: Accelerated Growth (Flexibility: 20%)

2013-18	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	14.1	2.6	16.7	ha
Industrial baseline (other + warehousing)	20.0	6.5	26.4	ha
Baseline B use land requirement (ha)	***34.0***	***9.1***	***43.1***	***ha***
Allowance for flexibility	6.8	1.8	8.6	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**53.7**	**15.6**	**69.4**	**ha**

2018-23	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	9.4	2.7	12.1	ha
Industrial baseline (other + warehousing)	30.6	9.2	39.9	ha
Baseline B use land requirement (ha)	***40.0***	***12.0***	***51.9***	***ha***
Allowance for flexibility	8.0	2.4	10.4	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**60.8**	**19.1**	**79.9**	**ha**

2013-23	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	23.5	5.3	28.8	ha
Industrial baseline (other + warehousing)	50.6	15.7	66.3	ha
Baseline B use land requirement (ha)	***74.0***	***21.1***	***95.1***	***ha***
Allowance for flexibility	14.8	4.2	19.0	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**114.6**	**34.7**	**149.3**	**ha**

2023-28	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	9.9	1.0	10.9	ha
Industrial baseline (other + warehousing)	20.0	5.3	25.3	ha
Baseline B use land requirement (ha)	***29.9***	***6.3***	***36.2***	***ha***
Allowance for flexibility	6.0	1.3	7.2	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**48.7**	**12.3**	**61.0**	**ha**

Appendix I Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Accelerated Growth Scenario

2028-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	8.6	0.6	9.2	ha
Industrial baseline (other + warehousing)	19.7	3.3	23.0	ha
Baseline B use land requirement (ha)	***28.3***	***3.9***	***32.2***	***ha***
Allowance for flexibility	5.7	0.8	6.4	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**46.8**	**9.4**	**56.2**	**ha**

2023-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	18.4	1.6	20.0	ha
Industrial baseline (other + warehousing)	39.7	8.6	48.4	ha
Baseline B use land requirement (ha)	***58.1***	***10.2***	***68.4***	***ha***
Allowance for flexibility	11.6	2.0	13.7	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**95.5**	**21.7**	**117.3**	**ha**

2013-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	41.9	6.9	48.8	ha
Industrial baseline (other + warehousing)	90.3	24.4	114.6	ha
Baseline B use land requirement (ha)	***132.1***	***31.3***	***163.4***	***ha***
Allowance for flexibility	26.4	6.3	32.7	
Allowance for windfall losses	22.9	12.4	35.3	ha
Allowance for churn	28.7	6.5	35.2	ha
Total B use land requirement (ha) with flexibility and allowances	**210.1**	**56.4**	**266.6**	**ha**

Appendix J Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Step Change Scenario

Scenario: Step Change (Flexibility: Zero)

2013-18	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	14.1	2.6	16.7	ha
Industrial baseline (other + warehousing)	20.0	6.5	26.4	ha
Baseline B use land requirement (ha)	***34.05***	***9.08***	***43.13***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**46.9**	**13.8**	**60.7**	**ha**

2018-23	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	10.2	2.7	12.9	ha
Industrial baseline (other + warehousing)	33.2	9.2	42.5	ha
Baseline B use land requirement (ha)	***43.41***	***11.98***	***55.39***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**56.3**	**16.7**	**73.0**	**ha**

2013-23	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	24.3	5.3	29.6	ha
Industrial baseline (other + warehousing)	53.2	15.7	68.9	ha
Baseline B use land requirement (ha)	***77.46***	***21.06***	***98.52***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**103.2**	**30.5**	**133.7**	**ha**

2023-28	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	10.7	1.0	11.7	ha
Industrial baseline (other + warehousing)	22.5	5.3	27.8	ha
Baseline B use land requirement (ha)	***33.23***	***6.32***	***39.55***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**46.1**	**11.0**	**57.2**	**ha**

Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Step Change Scenario

2028-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	9.5	0.6	10.1	ha
Industrial baseline (other + warehousing)	22.4	3.3	25.7	ha
Baseline B use land requirement (ha)	***31.91***	***3.92***	***35.82***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**44.8**	**8.6**	**53.4**	**ha**

2023-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	20.2	1.6	21.8	ha
Industrial baseline (other + warehousing)	44.9	8.6	53.6	ha
Baseline B use land requirement (ha)	***65.13***	***10.23***	***75.37***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**90.9**	**19.7**	**110.6**	**ha**

2013-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	44.5	6.9	51.4	ha
Industrial baseline (other + warehousing)	98.1	24.4	122.4	ha
Baseline B use land requirement (ha)	***142.6***	***31.3***	***173.9***	***ha***
Allowance for flexibility	0.0	0.0	0.0	
Allowance for windfall losses	22.9	12.4	35.3	ha
Allowance for churn	28.7	6.5	35.2	ha
Total B use land requirement (ha) with flexibility and allowances	**194.1**	**50.2**	**244.3**	**ha**

Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Step Change Scenario

Scenario: Step Change (Flexibility: 10%)

2013-18	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	14.1	2.6	16.7	ha
Industrial baseline (other + warehousing)	20.0	6.5	26.4	ha
Baseline B use land requirement (ha)	***34.0***	***9.1***	***43.1***	***ha***
Allowance for flexibility	3.4	0.9	4.3	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**50.3**	**14.7**	**65.1**	**ha**

2018-23	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	10.2	2.7	12.9	ha
Industrial baseline (other + warehousing)	33.2	9.2	42.5	ha
Baseline B use land requirement (ha)	***43.4***	***12.0***	***55.4***	***ha***
Allowance for flexibility	4.3	1.2	5.5	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**60.6**	**17.9**	**78.5**	**ha**

2013-23	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	24.3	5.3	29.6	ha
Industrial baseline (other + warehousing)	53.2	15.7	68.9	ha
Baseline B use land requirement (ha)	***77.5***	***21.1***	***98.5***	***ha***
Allowance for flexibility	7.7	2.1	9.9	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**111.0**	**32.6**	**143.6**	**ha**

2023-28	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	10.7	1.0	11.7	ha
Industrial baseline (other + warehousing)	22.5	5.3	27.8	ha
Baseline B use land requirement (ha)	***33.2***	***6.3***	***39.5***	***ha***
Allowance for flexibility	3.3	0.6	4.0	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**49.4**	**11.7**	**61.1**	**ha**

Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Step Change Scenario

2028-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	9.5	0.6	10.1	ha
Industrial baseline (other + warehousing)	22.4	3.3	25.7	ha
Baseline B use land requirement (ha)	***31.9***	***3.9***	***35.8***	***ha***
Allowance for flexibility	3.2	0.4	3.6	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**48.0**	**9.0**	**57.0**	**ha**

2023-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	20.2	1.6	21.8	ha
Industrial baseline (other + warehousing)	44.9	8.6	53.6	ha
Baseline B use land requirement (ha)	***65.1***	***10.2***	***75.4***	***ha***
Allowance for flexibility	6.5	1.0	7.5	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**97.4**	**20.7**	**118.1**	**ha**

2013-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	44.5	6.9	51.4	ha
Industrial baseline (other + warehousing)	98.1	24.4	122.4	ha
Baseline B use land requirement (ha)	***142.6***	***31.3***	***173.9***	***ha***
Allowance for flexibility	14.3	3.1	17.4	
Allowance for windfall losses	22.9	12.4	35.3	ha
Allowance for churn	28.7	6.5	35.2	ha
Total B use land requirement (ha) with flexibility and allowances	**208.4**	**53.3**	**261.7**	**ha**

Employment Land Demand Summary Tables in Five, Ten and Twenty Year Periods: Step Change Scenario

Scenario: Step Change (Flexibility: 20%)

2013-18	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	14.1	2.6	16.7	ha
Industrial baseline (other + warehousing)	20.0	6.5	26.4	ha
Baseline B use land requirement (ha)	***34.0***	***9.1***	***43.1***	***ha***
Allowance for flexibility	6.8	1.8	8.6	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**53.7**	**15.6**	**69.4**	**ha**

2018-23	**Eastern Dorset HMA**	**Western Dorset HMA**	**Dorset LEP area**	
Office baseline	10.2	2.7	12.9	ha
Industrial baseline (other + warehousing)	33.2	9.2	42.5	ha
Baseline B use land requirement (ha)	***43.4***	***12.0***	***55.4***	***ha***
Allowance for flexibility	8.7	2.4	11.1	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**65.0**	**19.1**	**84.1**	**ha**

2013-23	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	24.3	5.3	29.6	ha
Industrial baseline (other + warehousing)	53.2	15.7	68.9	ha
Baseline B use land requirement (ha)	***77.5***	***21.1***	***98.5***	***ha***
Allowance for flexibility	15.5	4.2	19.7	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**118.7**	**34.7**	**153.4**	**ha**

2023-28	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	10.7	1.0	11.7	ha
Industrial baseline (other + warehousing)	22.5	5.3	27.8	ha
Baseline B use land requirement (ha)	***33.2***	***6.3***	***39.5***	***ha***
Allowance for flexibility	6.6	1.3	7.9	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**52.8**	**12.3**	**65.1**	**ha**

2028-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	9.5	0.6	10.1	ha
Industrial baseline (other + warehousing)	22.4	3.3	25.7	ha
Baseline B use land requirement (ha)	***31.9***	***3.9***	***35.8***	***ha***
Allowance for flexibility	6.4	0.8	7.2	
Allowance for windfall losses	5.7	3.1	8.8	ha
Allowance for churn	7.2	1.6	8.8	ha
Total B use land requirement (ha) with flexibility and allowances	**51.2**	**9.4**	**60.6**	**ha**

2023-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	20.2	1.6	21.8	ha
Industrial baseline (other + warehousing)	44.9	8.6	53.6	ha
Baseline B use land requirement (ha)	***65.1***	***10.2***	***75.4***	***ha***
Allowance for flexibility	13.0	2.0	15.1	
Allowance for windfall losses	11.4	6.2	17.6	ha
Allowance for churn	14.3	3.3	17.6	ha
Total B use land requirement (ha) with flexibility and allowances	**103.9**	**21.7**	**125.7**	**ha**

2013-33	Eastern Dorset HMA	Western Dorset HMA	Dorset LEP area	
Office baseline	44.5	6.9	51.4	ha
Industrial baseline (other + warehousing)	98.1	24.4	122.4	ha
Baseline B use land requirement (ha)	***142.6***	***31.3***	***173.9***	***ha***
Allowance for flexibility	28.5	6.3	34.8	
Allowance for windfall losses	22.9	12.4	35.3	ha
Allowance for churn	28.7	6.5	35.2	ha
Total B use land requirement (ha) with flexibility and allowances	**222.7**	**56.4**	**279.1**	**ha**

Appendix K Key Statistics for Growth Scenarios

Trend Scenario

Eastern Dorset	2013-18	2018-23	2013-23	2023-28	2028-33	2023-33	2013-33
FTE growth (000s)	9.8	4.5	14.3	4.7	6.8	11.5	25.9
FTE change pa	0.8%	0.4%	0.6%	0.4%	0.5%	0.5%	0.5%
Total employment growth (000s)	15.8	9.4	25.2	7.7	8.5	16.2	41.4
Total employment change pa	1.1%	0.6%	0.9%	0.5%	0.5%	0.5%	0.7%
B1-B8 FTEs inc above (000s)	*7.5*	*2.6*	*10.1*	*2.0*	*2.8*	*4.9*	*15.0*
B1-B8 FTE change pa	*1.3%*	*0.4%*	*0.9%*	*0.3%*	*0.5%*	*0.4%*	*0.6%*
GVA growth (£m 2008)	1,169	1,343	2,512	1,418	1,721	3,139	5,651
GVA change pa	2.1%	2.2%	2.2%	2.1%	2.3%	2.2%	2.2%
Housing growth	na	na	na	na	na	na	na
Baseline B use land requirement (ha)	35.2	21.4	56.7	12.6	19.9	32.5	89.1
Total B use land requirement (ha)	48.1	34.3	82.4	25.4	32.8	58.2	140.7
Total B use land requirement (ha) with 10% flexibility	*51.6*	*36.5*	*88.1*	*26.7*	*34.8*	*61.5*	*149.6*
Total B use land requirement (ha) with 20% flexibility	*55.2*	*38.6*	*93.8*	*28.0*	*36.8*	*64.7*	*158.5*

Table K.1

Western Dorset	2013-18	2018-23	2013-23	2023-28	2028-33	2023-33	2013-33
FTE growth (000s)	2.4	0.9	3.3	0.8	1.2	2.1	5.3
FTE change pa	0.8%	0.3%	0.5%	0.3%	0.4%	0.3%	0.4%
Total employment growth (000s)	3.9	2.1	6.0	1.5	1.6	3.2	9.2
Total employment change pa	1.0%	0.5%	0.8%	0.4%	0.4%	0.4%	0.6%
B1-B8 FTEs inc above (000s)	*1.7*	*0.5*	*2.2*	*0.2*	*0.3*	*0.5*	*2.7*
B1-B8 FTE change pa	*1.3%*	*0.3%*	*0.8%*	*0.1%*	*0.2%*	*0.2%*	*0.5%*
GVA growth (£m 2008)	308	319	627	325	390	715	1,342
GVA change pa	2.3%	2.1%	2.2%	1.9%	2.1%	2.0%	2.1%
Housing growth	na	na	na	na	na	na	na
Baseline B use land requirement (ha)	3.5	4.4	7.9	1.0	2.0	3.0	10.9
Total B use land requirement (ha)	8.2	9.1	17.4	5.7	6.7	12.4	29.8
Total B use land requirement (ha) with 10% flexibility	*8.6*	*9.6*	*18.2*	*5.8*	*6.9*	*12.7*	*30.9*
Total B use land requirement (ha) with 20% flexibility	*9.0*	*10.0*	*19.0*	*5.9*	*7.1*	*13.0*	*32.0*

Table K.2

Dorset LEP area	2013-18	2018-23	2013-23	2023-28	2028-33	2023-33	2013-33
FTE growth (000s)	12.2	5.4	17.6	5.6	8.0	13.6	31.2
FTE change pa	0.8%	0.3%	0.6%	0.4%	0.5%	0.4%	0.5%
Total employment growth (000s)	19.8	11.5	31.2	9.3	10.1	19.3	50.6
Total employment change pa	1.1%	0.6%	0.9%	0.5%	0.5%	0.5%	0.7%
B1-B8 FTEs inc above (000s)	*9.3*	*3.1*	*12.4*	*2.2*	*3.1*	*5.4*	*17.7*
B1-B8 FTE change pa	*1.3%*	*0.4%*	*0.9%*	*0.3%*	*0.4%*	*0.4%*	*0.6%*
GVA growth (£m 2008)	1,477	1,661	3,139	1,743	2,111	3,854	6,993
GVA change pa	2.2%	2.2%	2.2%	2.1%	2.3%	2.2%	2.2%
Housing growth	na	na	na	na	na	na	na
Baseline B use land requirement (ha)	38.8	25.9	64.6	13.5	21.9	35.4	100.1
Total B use land requirement (ha)	56.4	43.5	99.8	31.1	39.5	70.7	170.5
Total B use land requirement (ha) with 10% flexibility	*60.2*	*46.1*	*106.3*	*32.5*	*41.7*	*74.2*	*180.5*
Total B use land requirement (ha) with 20% flexibility	*64.1*	*48.7*	*112.8*	*33.8*	*43.9*	*77.7*	*190.5*

Table K.3

Planned Growth Scenario

Eastern Dorset	2013-18	2018-23	2013-23	2023-28	2028-33	2023-33	2013-33
FTE growth (000s)	6.3	8.5	14.9	7.1	8.9	16.0	30.9
FTE change pa	0.5%	0.7%	0.6%	0.6%	0.7%	0.6%	0.6%
Total employment growth (000s)	11.7	14.2	25.9	10.6	11.1	21.7	47.6
Total employment change pa	0.8%	1.0%	0.9%	0.7%	0.7%	0.7%	0.8%
B1-B8 FTEs inc above (000s)	*5.8*	*4.6*	*10.4*	*3.2*	*3.9*	*7.0*	*17.4*
B1-B8 FTE change pa	*1.0%*	*0.8%*	*0.9%*	*0.5%*	*0.6%*	*0.6%*	*0.7%*
GVA growth (£m 2008)	1,002	1,536	2,539	1,556	1,873	3,429	5,968
GVA change pa	1.9%	2.6%	2.2%	2.3%	2.5%	2.4%	2.3%
Housing growth	10,024	13,485	23,509	11,187	14,122	25,309	48,818
Baseline B use land requirement (ha)	34.0	37.8	71.9	21.5	27.8	49.3	121.1
Total B use land requirement (ha)	46.9	50.7	97.6	34.4	40.7	75.0	172.7
Total B use land requirement (ha) with 10% flexibility	*50.3*	*54.5*	*104.8*	*36.5*	*43.5*	*80.0*	*184.8*
Total B use land requirement (ha) with 20% flexibility	*53.7*	*58.3*	*112.0*	*38.6*	*46.2*	*84.9*	*196.9*

Table K.4

Western Dorset	2013-18	2018-23	2013-23	2023-28	2028-33	2023-33	2013-33
FTE growth (000s)	2.1	4.0	6.2	2.1	1.6	3.8	10.0
FTE change pa	0.7%	1.2%	1.0%	0.6%	0.5%	0.5%	0.7%
Total employment growth (000s)	3.7	5.9	9.6	3.2	2.1	5.3	14.9
Total employment change pa	1.0%	1.5%	1.2%	0.8%	0.5%	0.6%	0.9%
B1-B8 FTEs inc above (000s)	*1.6*	*1.8*	*3.4*	*0.7*	*0.4*	*1.2*	*4.6*
B1-B8 FTE change pa	*1.2%*	*1.3%*	*1.3%*	*0.5%*	*0.3%*	*0.4%*	*0.8%*
GVA growth (£m 2008)	297	472	770	407	433	840	1,609
GVA change pa	2.2%	3.1%	2.6%	2.3%	2.2%	2.3%	2.4%
Housing growth	3,388	6,380	9,768	3,386	2,602	5,988	15,756
Baseline B use land requirement (ha)	9.1	12.0	21.1	6.3	3.5	9.8	30.8
Total B use land requirement (ha)	13.8	16.7	30.5	11.0	8.2	19.2	49.7
Total B use land requirement (ha) with 10% flexibility	*14.7*	*17.9*	*32.6*	*11.7*	*8.5*	*20.2*	*52.8*
Total B use land requirement (ha) with 20% flexibility	*15.6*	*19.1*	*34.7*	*12.3*	*8.9*	*21.2*	*55.9*

Table K.5

Dorset LEP area	2013-18	2018-23	2013-23	2023-28	2028-33	2023-33	2013-33
FTE growth (000s)	8.5	12.6	21.0	9.2	10.6	19.8	40.8
FTE change pa	0.6%	0.8%	0.7%	0.6%	0.6%	0.6%	0.7%
B1-B8 FTEs inc above (000s)	*7.4*	*6.4*	*13.8*	*3.9*	*4.3*	*8.2*	*22.0*
B1-B8 FTE change pa	*1.1%*	*0.9%*	*1.0%*	*0.5%*	*0.5%*	*0.5%*	*0.8%*
GVA growth (£m 2008)	1,300	2,009	3,308	1,963	2,306	4,269	7,577
GVA change pa	1.9%	2.7%	2.3%	2.3%	2.4%	2.3%	2.3%
Housing growth	13,412	19,865	33,277	14,573	16,724	31,297	64,574
Baseline B use land requirement (ha)	43.1	49.8	92.9	27.8	31.2	59.0	152.0
Total B use land requirement (ha)	60.7	67.4	128.1	45.4	48.9	94.3	222.4
Total B use land requirement (ha) with 10% flexibility	*65.1*	*72.4*	*137.4*	*48.2*	*52.0*	*100.2*	*237.6*
Total B use land requirement (ha) with 20% flexibility	*69.4*	*77.4*	*146.7*	*51.0*	*55.1*	*106.1*	*252.8*

Table K.6

Accelerated Growth Scenario

Eastern Dorset	2013-18	2018-23	2013-23	2023-28	2028-33	2023-33	2013-33
FTE growth (000s)	6.3	9.3	15.6	9.1	9.0	18.1	33.7
FTE change pa	0.5%	0.8%	0.7%	0.7%	0.7%	0.7%	0.7%
Total employment growth (000s)	11.7	15.1	26.8	13.1	11.2	24.3	51.1
Total employment change pa	0.8%	1.0%	0.9%	0.9%	0.7%	0.8%	0.9%
B1-B8 FTEs inc above (000s)	*5.8*	*4.9*	*10.7*	*4.2*	*3.9*	*8.1*	*18.8*
B1-B8 FTE change pa	*1.0%*	*0.8%*	*0.9%*	*0.7%*	*0.6%*	*0.6%*	*0.8%*
GVA growth (£m 2008)	1,002	1,578	2,580	1,675	1,893	3,569	6,149
GVA change pa	1.9%	2.6%	2.2%	2.5%	2.5%	2.5%	2.3%
Housing growth	10,024	14,648	24,672	14,415	14,298	28,713	53,385
Baseline B use land requirement (ha)	34.0	40.0	74.0	29.9	28.3	58.1	132.1
Total B use land requirement (ha)	46.9	52.8	99.8	42.8	41.2	83.9	183.7
Total B use land requirement (ha) with 10% flexibility	*50.3*	*56.8*	*107.2*	*45.7*	*44.0*	*89.7*	*196.9*
Total B use land requirement (ha) with 20% flexibility	*53.7*	*60.8*	*114.6*	*48.7*	*46.8*	*95.5*	*210.1*

Table K.7

Western Dorset	2013-18	2018-23	2013-23	2023-28	2028-33	2023-33	2013-33
FTE growth (000s)	2.1	4.0	6.2	2.1	1.8	3.9	10.1
FTE change pa	0.7%	1.2%	1.0%	0.6%	0.5%	0.6%	0.8%
Total employment growth (000s)	3.7	5.9	9.6	3.2	2.3	5.5	15.1
Total employment change pa	1.0%	1.5%	1.2%	0.8%	0.5%	0.6%	0.9%
B1-B8 FTEs inc above (000s)	*1.6*	*1.8*	*3.4*	*0.7*	*0.5*	*1.2*	*4.7*
B1-B8 FTE change pa	*1.2%*	*1.3%*	*1.3%*	*0.5%*	*0.3%*	*0.4%*	*0.8%*
GVA growth (£m 2008)	297	472	770	407	440	846	1,616
GVA change pa	2.2%	3.1%	2.6%	2.3%	2.2%	2.3%	2.5%
Housing growth	3,388	6,380	9,768	3,386	2,781	6,167	15,935
Baseline B use land requirement (ha)	9.1	12.0	21.1	6.3	3.9	10.2	31.3
Total B use land requirement (ha)	13.8	16.7	30.5	11.0	8.6	19.7	50.2
Total B use land requirement (ha) with 10% flexibility	*14.7*	*17.9*	*32.6*	*11.7*	*9.0*	*20.7*	*53.3*
Total B use land requirement (ha) with 20% flexibility	*15.6*	*19.1*	*34.7*	*12.3*	*9.4*	*21.7*	*56.4*

Table K.8

Dorset LEP area	2013-18	2018-23	2013-23	2023-28	2028-33	2023-33	2013-33
FTE growth (000s)	8.5	13.3	21.8	11.3	10.8	22.0	43.8
FTE change pa	0.6%	0.9%	0.7%	0.7%	0.6%	0.7%	0.7%
Total employment growth (000s)	15.3	21.1	36.4	16.3	13.5	29.8	66.2
Total employment change pa	0.9%	1.1%	1.0%	0.8%	0.7%	0.7%	0.9%
B1-B8 FTEs inc above (000s)	*7.4*	*6.7*	*14.2*	*4.9*	*4.4*	*9.3*	*23.5*
B1-B8 FTE change pa	*1.1%*	*0.9%*	*1.0%*	*0.6%*	*0.6%*	*0.6%*	*0.8%*
GVA growth (£m 2008)	1,300	2,050	3,350	2,082	2,333	4,415	7,765
GVA change pa	1.9%	2.7%	2.3%	2.4%	2.4%	2.4%	2.4%
Housing growth	13,412	21,028	34,440	17,801	17,079	34,880	69,320
Baseline B use land requirement (ha)	43.1	51.9	95.1	36.2	32.2	68.4	163.4
Total B use land requirement (ha)	60.7	69.5	130.3	53.8	49.8	103.6	233.9
Total B use land requirement (ha) with 10% flexibility	*65.1*	*74.7*	*139.8*	*57.4*	*53.0*	*110.4*	*250.2*
Total B use land requirement (ha) with 20% flexibility	*69.4*	*79.9*	*149.3*	*61.0*	*56.2*	*117.3*	*266.6*

Table K.9

Step Change Scenario

Eastern Dorset	2013-18	2018-23	2013-23	2023-28	2028-33	2023-33	2013-33
FTE growth (000s)	6.3	10.1	16.5	10.0	10.0	20.0	36.4
FTE change pa	0.5%	0.8%	0.7%	0.8%	0.8%	0.8%	0.7%
Total employment growth (000s)	11.7	16.2	27.9	14.2	12.4	26.6	54.4
Total employment change pa	0.8%	1.1%	1.0%	0.9%	0.8%	0.8%	0.9%
B1-B8 FTEs inc above (000s)	*5.8*	*5.3*	*11.2*	*4.6*	*4.4*	*9.0*	*20.1*
B1-B8 FTE change pa	*1.0%*	*0.9%*	*1.0%*	*0.7%*	*0.7%*	*0.7%*	*0.8%*
GVA growth (£m 2008)	1,002	1,624	2,627	1,730	1,962	3,691	6,318
GVA change pa	1.9%	2.7%	2.3%	2.5%	2.5%	2.5%	2.4%
Housing growth	10,024	16,042	26,066	15,801	15,801	31,602	57,668
Baseline B use land requirement (ha)	34.0	43.4	77.5	33.2	31.9	65.1	142.6
Total B use land requirement (ha)	46.9	56.3	103.2	46.1	44.8	90.9	194.1
Total B use land requirement (ha) with 10% flexibility	*50.3*	*60.6*	*111.0*	*49.4*	*48.0*	*97.4*	*208.4*
Total B use land requirement (ha) with 20% flexibility	*53.7*	*65.0*	*118.7*	*52.8*	*51.2*	*103.9*	*222.7*

Table K.10

Western Dorset	2013-18	2018-23	2013-23	2023-28	2028-33	2023-33	2013-33
FTE growth (000s)	2.1	4.0	6.2	2.1	1.8	3.9	10.1
FTE change pa	0.7%	1.2%	1.0%	0.6%	0.5%	0.6%	0.8%
Total employment growth (000s)	3.7	5.9	9.6	3.2	2.3	5.5	15.1
Total employment change pa	1.0%	1.5%	1.2%	0.8%	0.5%	0.6%	0.9%
B1-B8 FTEs inc above (000s)	*1.6*	*1.8*	*3.4*	*0.7*	*0.5*	*1.2*	*4.7*
B1-B8 FTE change pa	*1.2%*	*1.3%*	*1.3%*	*0.5%*	*0.3%*	*0.4%*	*0.8%*
GVA growth (£m 2008)	297	472	770	407	440	846	1,616
GVA change pa	2.2%	3.1%	2.6%	2.3%	2.2%	2.3%	2.5%
Housing growth	3,388	6,380	9,768	3,386	2,781	6,167	15,935
Baseline B use land requirement (ha)	9.1	12.0	21.1	6.3	3.9	10.2	31.3
Total B use land requirement (ha)	13.8	16.7	30.5	11.0	8.6	19.7	50.2
Total B use land requirement (ha) with 10% flexibility	*14.7*	*17.9*	*32.6*	*11.7*	*9.0*	*20.7*	*53.3*
Total B use land requirement (ha) with 20% flexibility	*15.6*	*19.1*	*34.7*	*12.3*	*9.4*	*21.7*	*56.4*

Table K.11

Dorset LEP area	2013-18	2018-23	2013-23	2023-28	2028-33	2023-33	2013-33
FTE growth (000s)	8.5	13.3	21.8	11.3	10.8	22.0	43.8
FTE change pa	0.6%	0.9%	0.7%	0.7%	0.6%	0.7%	0.7%
Total employment growth (000s)	15.3	21.1	36.4	16.3	13.5	29.8	66.2
Total employment change pa	0.9%	1.1%	1.0%	0.8%	0.7%	0.7%	0.9%
B1-B8 FTEs inc above (000s)	*7.4*	*6.7*	*14.2*	*4.9*	*4.4*	*9.3*	*23.5*
B1-B8 FTE change pa	*1.1%*	*0.9%*	*1.0%*	*0.6%*	*0.6%*	*0.6%*	*0.8%*
GVA growth (£m 2008)	1,300	2,050	3,350	2,082	2,333	4,415	7,765
GVA change pa	1.9%	2.7%	2.3%	2.4%	2.4%	2.4%	2.4%
Housing growth	13,412	21,028	34,440	17,801	17,079	34,880	69,320
Baseline B use land requirement (ha)	43.1	51.9	95.1	36.2	32.2	68.4	163.4
Total B use land requirement (ha)	60.7	69.5	130.3	53.8	49.8	103.6	233.9
Total B use land requirement (ha) with 10% flexibility	*65.1*	*74.7*	*139.8*	*57.4*	*53.0*	*110.4*	*250.2*
Total B use land requirement (ha) with 20% flexibility	*69.4*	*79.9*	*149.3*	*61.0*	*56.2*	*117.3*	*266.6*

Table K.12